COMPLETED
MAY 1987
HE 23.30(2) H81/9

TASK FORCE TO CREATE AFFORDABLE HOUSING ALTERNATIVES FOR THE ELDERY

September 1, 1984 - September 30, 1986

Final Report

Elderly Housing Task Force
Metropolitan Chicago Coalition on Aging
53 West Jackson - Suite 918
Chicago, Illinois 60604
(312) 922-5890
February, 1986

"This project was supported, in part, by award number 90-AM-0094/01, from the Administration on Aging, Office of Human Development Services, Washington D.C. 20201. Grantees undertaking projects under government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official Administration on Aging policy."

82
ORIGINAL
BEST COPY AVAILABLE

Task Force to Create Affordable Housing Alternatives for the Elderly

Project Abstract

The Task Force to Create Affordable Housing Alternatives for the Elderly's purpose was to alleviate the shortage of affordable housing alternatives for the elderly people in the Chicago metro area and to have a substantial and long-term impact on housing for the elderly nationally.

In the process of creating housing alternatives for the elderly, the Task Force also engaged in two subsidiary activities which had far reaching implications: 1) investigated as needed in existing legislation affecting housing alternatives, thus creating legislative models for public policy development; and 2) developed consumer and public education programs to increase public awareness and acceptance of housing alternatives.

The Task Force, composed of representatives of voluntary social services, health care providers, real estate developers and public agencies; developed a program of affordable housing options for older people and mobilized various sections of the Chicago area to implement this program.

The basic premise of the Task Force was that local initiative was necessary to solve local problems. Although the Task Force was intended as a national model for alternative housing development, it is also a model for use by local communities which demonstrates the efficacy of the collaborative action by public and private sectors in the community. The Task Force approach meets social needs locally by influencing markets and alternately the behavior of individuals and institutions, in this case, in the area of housing for the elderly.

BEST COPY AVAILABLE

Task Force to Create Affordable Housing Alternatives for the Elderly

Policy/Program Implications Paper

Our experience has proven that coalition building involving a wide array of professional sectors can lead to the development of many positive activities in the area of elderly housing. Our Congregate Housing Committee, for example, pooled together the expertise and resources of professionals who had not been accustomed to working together, namely real estate developers, architects, housing managers and zoning officials, with doctors, nurses and social service providers. Together, this group of professionals from varying backgrounds, helped MCCoA to: (1) recruit speakers and a responsive audience for our 6 housing forums and round table luncheons, (2) identify existing congregate housing facilities to tour and analyze, (3) develop an in-depth guideline on congregate housing development designed for a broad audience including zoning officials, village managers, architects, developers, offices on aging, community organizations, as well as hospitals and church groups contemplating the development of elderly housing. The same holds true for our Respite Care and Home Sharing Committees since the professionals participating in our coalition building around these housing options similarly led to other positive activities.

Toward the end of the second year of our Project we learned that coalition building on a neighborhood level rather than a broad metro-wide scope would be most effective. We therefore, are laying the groundwork for developing neighborhood-based senior housing councils, made up of representatives of neighborhood leading social service, religious, financial, government, real-estate, and health care organizations.

We believe that such neighborhood housing council will be familiar with the existing housing and social service resources in their communities and will be best able to identify additional housing options that seniors in their neighborhood may want. Moreover, these councils can help MCCoA develop and administer a housing interest questionnaire designed to assess which particular housing options are most desired by seniors in a particular community. Our findings therefore recommend a neighborhood-based coalition building approach as the best method of developing housing options responsive to the needs and preferences of seniors.

Our Elderly Housing Task Force work has also revealed to us that the elderly housing field is undeveloped, that many sectors are unfamiliar with how to proceed with housing development, and that few comprehensive housing resources exist. Our findings specifically indicate the following:

- There is no comprehensive information resource or service to counsel seniors about housing options and their availability.

- There is need for area-wide market research and education, both for seniors and lending institutions, about home equity conversion, an option with limited but very definite applicability to certain homeowners.

BEST COPY AVAILABLE

- There is an information gap about senior housing needs among local community officials.

- There is no one representing the elderly in local housing activist groups.

- Non-profit sponsors of housing need linkage with experts who can help them finance and develop housing.

- Developers of congregate and retirement housing need direction in creating service packages.

- Home-sharing is a cost-effective way for small agencies to meet local housing needs, but agencies need technical assistance and support to start programs.

- There is ongoing need for information, networking, and public policy review in the area of senior housing.

- There is need for more affordable housing alternatives for elderly people in the Chicago area.

- There is no permanent and comprehensive housing center serving the area that can promote development of alternatives and fill these information gaps.

We expect that such gaps in resources and linkage may occur in communities across the country. Therefore, we cite these as areas meriting community attention and action.

Task Force to Create Affordable Housing Alternatives for the Elderly

Dissemination & Utilization

Information sharing and dissemination has been a major activity and priority of this project. We have disseminated Elderly Housing Task Force material through local, state, and federal channels, through print media (newsletters, newspapers, journal articles) television spots, and among varying professional sectors (health care, social service, real-estate, housing management, religious, university departments). Moreover, project staff and committee members have spoken on panels at conferences, before audiences of senior citizens, and have also shared Elderly Housing Task Force findings with members of other Chicago area housing and aging task forces and committees.

The following is an account of Elderly Housing Task Force project dissemination activities:

Committee Dissemination

1. A Congregate Housing Networking Directory (see appendix A) has been developed and includes individuals who attended the Congregate Housing Forums and luncheons, along with Congregate Housing Committee members, and others who have networked with MCCoA Elderly Housing Task Force staff. Each person listed in the directory has indicated several skills he can offer toward congregate housing development, including: (1) housing management policy development, (2) reading and developing blueprints, (3) identifying potential building sites, (4) conducting market research. This directory has been disseminated through MCCoA membership (over 300 agencies and individuals in the Chicago metro area) in the hope that it will foster further collaborative effort toward congregate housing development. This directory will be updated and disseminated yearly.

2. Congregate Housing Committee members are developing a document called "Guidelines for the Community Development and Regulation of Older Adult Housing" which will be disseminated to municipalities in order to educate them on essential features to incorporate in congregate housing facilities. These guidelines will also be made available to housing developers to encourage them to incorporate recommended design and service features in their facilities

3. MCCoA plans to work with a local association of Single Room Occupancy (SRO) hotel operators and owners to orient them to the aging network and the services which they can access for their senior citizen tenants. The seniors whom they house are very poor with few friends or relatives available to provide informal supports.

BEST COPY AVAILABLE

4. Respite Care Committee members conducted survey research to substantiate the critical need for respite care services to state and federal funders and policymakers. Research results have been published in MCCoA's newsletter, Focus, reaching over 300 agencies, organizations and institutions across Illinois.(see appendix D)

5. Respite Care Committee members developed a Respite Care Policy Recommendations paper (see appendix C) that was distributed through MCCoA's membership as well as through that of the Illinois Hospital Association. As a result, over 400 agencies, hospitals, and organizations within Illinois read the paper, leading to its endorsement by over 100 of them. This policy recommendation paper was presented to the Illinois Department on Aging and Illinois legislature for their review.

6. Home-Sharing Committee members have disseminated their program materials and successful strategies to agencies just beginning a home-sharing program.

7. Home-Sharing Committee members have developed a brief slide show on home-sharing. They plan to refine this work first by conducting a survey to determine the barriers dissuading seniors from entering home-sharing relationships, and then by developing a slide show or film that breaks down these attitude barriers while stressing the potential benefits of home-sharing.

8. Our young Senior Housing Development Councils will disseminate a housing needs assessment to seniors in select neighborhoods of metropolitan Chicago in order to determine exactly which housing options are most preferred by seniors living in these areas. (Areas include the Albany/Irving Park, Greater Chatham, and Roseland neighborhoods of Chicago and the City of Evanston)

Education Activities

1. MCCoA, with input of its housing committees, sponsored and developed a 6-part forum series covering the scope of housing alternatives (see appendix E for Forum brochure). These sessions covered congregate housing (financing and development), group homes, home-sharing, home-equity conversion, ECHO housing, accessory apartments, and respite

2. Project Director presented an educational session on Housing Options for Older Persons at PLOWS Council on Aging's May 22, 1985 Seniorama Day. After learning about the concept, one senior citizen participant contacted one of the home-sharing network's pilot programs to seek a housemate for home-sharing.

3. In July, 1985, Project Director gave a presentation on Respite Care issues to Information & Referral Providers at the Northeastern Illinois Workers In Aging Conference in DeKalb, Illinois.

BEST COPY AVAILABLE

4. In October, 1985, Project Director gave a presentation to the Illinois Council on Aging on housing needs of the elderly, focusing on the recommendations she helped prepare for the elderly component of the Illinois State Housing Plan.

5. In cooperation with the Region V Administration on Aging (AoA), the Project Director co-sponsored a November 6-7, 1985 Conference for Region V Administration on Aging staff. On November 6th, representatives from Region AoA (Illinois, Ohio, Wisconsin, Michigan, Minnesota, and Indiana) presented their state's elderly housing initiatives. On November 7th, Region V AoA representatives attended a morning conference on Home Equity Conversion, followed by a luncheon meeting where they could ask specific questions of the presenters.

6. Project Director, while participating on the planning committees for both the 1986 Governor's Aging Network Conference and 1986 MACA Conference, developed conference sessions on elderly housing and respite care.

7. Project staff have provided individual agencies with program and conceptual information on available home-sharing, home-equity conversion, congregate housing, and respite care. Staff have also provided developers, market research firms and government offices from around the country with information on the Chicago area and national elderly housing market.

8. Project Director led a round-table presentation on MCCoA's achievements with regard to respite care, entitled "Advocacy and Coalition Building Around Respite Care Needs." Twenty individuals, representing agencies from around the country, attended.

Media Dissemination

1. In February, 1985, the Housing Administrator appeared on a CBS-TV talk show providing information on elderly housing.

2. In April, 1985, the Project Director was interviewed by a representative of the American Medical News Journal regarding the issue of respite care.

3. In June, 1985, MCCoA's Executive Director appeared on 2 talk shows (WFLD-TV/Channel 32 and WGN-TV/Channel 9) during the month of June and talked about elderly housing in general.

4. Housing Administrator was interviewed by the Real-Estate Editor of the Chicago Sun-Times, and was quoted in an article on senior housing which appeared in the July 5,1985 Edition of the Chicago Sun-Times.

5. In October, 1985, Project Director was quoted in a monthly newsletter, "The Neighborhood Works," concerning the housing needs of low-income elderly who live in single room occupancy (SRO) hotels. This publication is circulated to housing specialists in the Chicago area and around the country.

BEST COPY AVAILABLE

6. Project Director was quoted extensively on elderly housing options in a special feature of the Chicago Sun-Times Real-Estate section dated July 4, 1986.

7. In August, 1986, MCCoA's Executive Director appeared on a Channel 11 (WTTW) Television show, as part of a panel discussing consumer protection in life care facility contracts.

Policy/Advocacy Dissemination

1. Project staff participated in a Governor's Task Force to create an Illinois State Housing Plan to be used for legislative planning initiatives in Illinois. Project staff represented the project on the Affodable Housing for the Elderly Committee and the Tenant Landlord Relations Committee, each of which submitted a policy recommendation plan to the Governor.

2. In October, 1985, Project Administrator testified before the Illinois State legislature in Springfield on the respite care needs of family caregivers.

3. Project Director has provided the Mayors, Village Planners and directors of Senior Citizen Commissions of several communities with background information on elderly housing alternatives. Some of these communities in turn have used this information to amend zoning codes that permit a greater variety of elderly housing in their areas.

4. Project Director regularly attends meetings of local housing advocacy groups including: (1) State Housing Action Coalition, (2) Chicago Coalition for the Homeless, (3) Illinois Coalition for Affordable Housing, and (4) Regional Housing Action Study Group. These groups are trying to leverage the earmarking of a percentage of funds from the Illinois Housing Development Authority for low income housing development.

BEST COPY AVAILABLE

This Final Report was prepared jointly by Gerilyn Miller-Merens, principal investigator and former Project Director of the Metropolitan Chicago Coalition on Aging's Elderly Housing Task Force, Marci Factor-Karoll, Project Director of the Senior Housing Center of the Metropolitan Chicago Coalition on Aging and, Roger Nash, Associate Executive Director of the Metropolitan Chicago Coalition on Aging.

A Guide to Replication has also been prepared as a supplement to the Final Report.

Funded by:

The Administration on Aging, Office of Human Development Services, Department. of Health & Human Services - Grant #90-AM-0094/01

The Lloyd A. Fry Foundation

The W.P. & H.B. White Foundation

The American Broadcasting Company

BEST COPY AVAILABLE

Table of Contents

I. Introduction.....1

II. Addressing the Need.....2

III. Initial Goals and Action Steps for the Project.....3

IV. Project Structure.....8

V. Significant Findings and Events.....8

VI. Elderly Housing Task Force Accomplishments.....10

VII. New Program Iniatives.....16

VIII. Summary.....17

IX. Notes.....19

X. Appendices.....20

A. Advocacy in Action Housing Group Recommendations

B. Congregate Housing Networking Directory

C. Respite Care Policy Recommendation Paper

D. MCCoA Focus, Summer, 1986

E. MCCoA 1985 Forum on Aging Series Brochure

I. Introduction

The Elderly Housing Task Force (EHTF) of the Metropolitan Chicago Coalition on Aging, in existence since September 1, 1984 and funded in large part under grant #90-AM-0094/01 from the U.S. Administration on Aging, has become a respected focal point for elderly housing and social service system development in the Chicago metropolitan area, as well as within the state of Illinois and nationally. This Final Report presents an overview of the EHTF project's development, and also outlines its structure, goals/objectives and array of successful accomplishments. To facilitate replication of this project's activities, by other groups across the country, a Guide to Replication has also been prepared as a supplement of the Final Report. Major findings, policy implications, and new directions evolving out of the EHTF work that MCCoA will pursue in the area of elderly housing and support services (beyond the term of the grant) will also be presented.

The underlying key ingredient which drove the project forward and helped it expand in many valuable directions was its emphasis on collaborative planning and the meeting of participants' mutual goals. This practice contributed to the birth of the EHTF, when in early 1984, the Metropolitan Chicago Coalition on Aging (MCCoA) organized three Advocacy in Action Committees to explore housing and support service problems of the elderly in metropolitan Chicago. Participants included representatives of social service agencies, real-estate, government departments, and advocacy groups. All faced difficulty in meeting the housing and support service needs of their clients, met for 12 consecutive weeks, and jointly developed strategies for addressing housing and respite care needs of Chicago's elderly.

II. Addressing the Need

The group did an in-depth evaluation of the elderly housing problem and learned that the need for more housing alternatives for older Americans was a major finding and recommendation of the 1981 White House Conference on Aging. In addition to calling for "a decent home and suitable living arrangements for all elderly families," the Conference Housing Alternatives Committee recommended that shared housing be "included in a comprehensive program of housing for older Americans," that congregate housing with support services be developed as an alternative to institutionalization, and that tax credits for respite care be given to families "caring for elderly grandparents and parents who reside with them." 1/

Demographic trends support these findings. The elderly are the fastest growing segment of the population. The number of elderly people has grown faster than the population as a whole. Since 1960, the increase for elderly people has been 21% as opposed to 13% overall. This growth rate is 3 1/2 times greater in the suburbs than in cities. By the year 1990, there will be 30 million Older Americans. 2/

What are the characteristics of this growing population? Most continue to live in the same homes and apartments they occupied when they were younger. They are less likely than other age groups to undertake repairs or improvements in their housing. They cannot afford it; their incomes upon

BEST COPY AVAILABLE

retirement drop 50% or more. In 1976, 1.04 million old people lived in units so deficient, they would not qualify under Section 8 program standards. Forty-one percent of elderly renters below poverty level spend over 45% of their incomes on housing. 3/

Elderly people thus tend to be house poor according to Michael Gutowski and Tracey Field (The Graying of Suburbia). Even for those elderly homeowners with substantial home equity "and therefore very low or no mortgage costs, increases in taxes and in fuel, operating and maintenance costs may make it difficult for them to remain in their homes." 4/

Older people who manage, however precariously, to live independently in houses or apartments are luckier than those 4 million Americans with functional disabilities who need full-time care. In 1983 testimony before the U.S. Senate, Senator Packwood asked for respite care tax credits for families who care for impaired elderly relatives at home. The Senator noted that 25% of the 1.4 million people in nursing homes...could live at home if family assistance is provided." 5/

In-home respite care is a needed alternative for frail elderly people who have families that can take care of them. Those without families can still remain living independently in a residential setting with support services such as meals, housekeeping, and personal care. Congregate housing services cost from 1/2 to 1/3 less in federal dollars in 1978 than nursing home care for comparable numbers of frail elderly people. A study on elderly housing programs from the Library of Congress estimates that 200 to 300,000 older Americans would live in congregate housing if that alternative were available to them. 6/

Using client data from their own and other local organizations, along with written reports from across the United States, the Advocacy in Action groups found that public funds for housing cannot meet the overwhelming demand, especially during a time when the older population is expected to dramatically rise. These groups also found a high and unmet need for support services and innovative housing options to enable elderly homeowners to keep and maintain their homes, along with respite services to encourage ongoing family support of frail elderly in the community setting. They insisted that planning for housing alternatives, educating the public about the range of innovative housing alternatives, and an increased supply of affordable housing alternatives that are responsive to elderly persons' changing needs must be developed now. As a result, Congregate Housing, Shared Housing, and Respite Care emerged as housing alternatives which would meet the support needs of seniors, could be affordable, and could be developed and financed through the collaborative effort of public, private, and voluntary organizations. (See appendix A for the complete set of Advocacy in Action Group recommendations).

With a solid understanding of the problem, along with realistic project strategies and a core group of talented individuals, the MCCoA developed a proposal to fund an Elderly Housing Task Force. The EHTF would strive to develop a comprehensive program of affordable alternative living arrangements for older people, primarily incorporating three housing options: 1) congregate housing facilities, 2) home-sharing arrangements, and 3) community-based respite care to extend families' caregiving

BEST COPY AVAILABLE

abilities to postpone the institutionalization of frail family members. Once again collaborative efforts would be employed since the EHTF would mobilize various sections of the Chicago metropolitan area to implement each facet of its housing agenda. Not only did the EHTF aim to alleviate the immediate shortage of affordable housing by increasing alternatives, but it sought to make a substantial and long-term impact on housing for the elderly nationally.

III. Initial Goals and Action Steps for the Project

The following outlines each housing option along with the goals and action steps to promote them.

Congregate Housing: According to Advocacy in Action Group members' experience with congregate housing programs, congregate housing with various levels of support service available, can serve elderly people well, particularly those without family caregivers.

Congregate housing facilities located within a community and having access to stores, transportation and other services are the most desirable. In a 1978 study by the United Way of Metropolitan Chicago, more than 30% of congregate housing residents and applicants chose this option because of its proximity to friends, family, and services. 7/

Other benefits of congregate housing include security and companionship, the ability of this housing option to accommodate individual differences and needs, and the probability that congregate housing can delay or even prevent institutionalization.

A major difficulty in developing congregate housing is the cost of actual housing construction or rehabilitation. Two local examples illustrate how this problem can be overcome. Bethel Housing on Chicago's west side obtained a loan from the Ford Foundation to rehabilitate a 24-unit building for low-income congregate housing. The building, Douglas Villa, will be owned by a partnership of investors and operated by a cooperative of residents which will lease the building from the partnership. Douglas Villa will be constructed and operated strictly with private resources, including the "sweat equity" of its residents. As a model of congregate housing, Douglas Villa proves that this housing option can be available without reliance on hard-pressed government resources.

Chelsea House, in Chicago's north side Uptown neighborhood, is owned and operated for profit, yet it offers attractive and comfortable congregate housing to older people at an affordable rental. A rehabilitated hotel, Chelsea House offers housekeeping and meal services to its residents. The idea that congregate housing for low and moderate income people can provide profits to owners and investors is proven by both Douglas Villa and Chelsea House. This idea will be emphasized by the Housing Task Force to stimulate private investors' and developers' participation in this housing option.

BEST COPY AVAILABLE

Another roadblock of the congregate housing alternative is resistance to this form of housing by community residents and consequential zoning regulations prohibiting it.

Goal: Development and implementation of 3 congregate housing facility models serving a total of 200 residents.

Action Steps:

1. Project administrators will plan a half-day conference on congregate housing for people who will be invited to become project participants and together form the project advisory group. The conference planners will present data on existing people who will be invited to become project participants and together form the project advisory group. The conference planners will present data on existing congregate housing facilities and the need for such housing compiled from local area agencies on aging, government agencies and housing providers. The conference will also cover the current types of congregate housing available locally and nationally.

   Potential conference participants include: public housing officials; current housing providers; local AAAs, local AoA and Illinois Department on Aging staff; real estate developers; financiers; local foundations; corporations; home health and other home care provider agencies (for support services); historic preservation groups and building trade practitioners (for rehabbing); state and municipal officials; the University of Illinois Housing Research and Development Center; real estate writers and public service media representatives; senior citizen groups; legislators.

2. Survey conference participants for interest in various congregate housing models.

3. Organize task forces out of the larger group to investigate models. Proposed models are:

   a) rehabilitating existing buildings for congregate housing;

   b) bringing support services into existing congregate facilities;

   c) clustering small congregate units to share support and maintenance services;

   d) alternatives to government funding for new congregate building construction.

   Other task forces will investigate changes needed in existing legislation affecting congregate housing and develop a consumer education program about congregate housing.

4. Determine appropriate sponsors for each model. Model construction will include legislative and regulatory recommendations.

BEST COPY AVAILABLE

5. Implement educational programs.

6. Use information and experience of project to create a resource center on congregate housing.

Home-Sharing: Based on the experience of Housing Group members who administer house sharing programs, this housing alternative answers the needs of house poor income in the form of rent and shared housing renters get housing for a relatively low cost. In addition to the financial advantages, house sharing provides companionship and a built-in emergency and support network for both owner and renter. Meals and chores can be shared. Shared housing provides both independence and security; with the help of a house sharer, older people can often put off a move to a nursing home or other institution. House sharing can provide intergenerational contact as well. Often, students or families pair up with elderly people. For agencies, shared housing programs are quite cost-effective and inexpensive to run.

These are some of the advantages of home-sharing. The major roadblocks to the availability of this housing alternative are zoning regulations which prohibit house sharing by unrelated adults. These regulations can be difficult to change because shared housing is often considered to be a threat to the single-family character of a neighborhood. Another major roadblock,related to the distrust of shared housing, is a general lack of information about this alternative and its benefits.

The EHTF sought to remove these barriers to shared housing by implementing a program of public education directed toward potential users of shared housing, zoning commissioners, legislators, city planners, and the general public which will focus on the concept and benefits of shared housing. At the same time, the EHTF sought to establish new home-sharing programs to increase housing options for elderly homeowners and renters.

Goal: Increase numbers and efficiency of home-sharing matches by networking among home-sharing agencies and providing technical assistance and resources to establish 5 new home-sharing programs which collectively will match 190 people.

Action Steps:

1. Organize a core group of organizations with shared housing programs, consumer groups, governmental bodies and potential shared housing organizations including real estate rental agents.

2. Core group plans a system of networking that will:

   a) find central location for bi-monthly meetings;

   b) get funding for or donated computer time to put current housing sharing data on a central computer (data provided by network members);

BEST COPY AVAILABLE

c) plan information and education to educate and inform potential consumers (young, old, single persons, families), promote the creation of new shared housing and make recommendations to zoning commissioners, legislators and city planners to remove legislative barriers to shared housing.

Respite Care: To learn about the current state of respite care services in the Chicago metropolitan area, the Advocacy in Action Group surveyed 12 providers of information and referral (I&R) and found that:

- o Definitions of respite vary as to the services considered components of a respite service system.
- o Statistics on respite care do not capture requests for traditional aging services which, when provided, relieve a caregiver in the process.
- o In-home care, either during the day or for a 24-hour/weekend period, is the most frequently requested respite service.
- o The need for in-home care is not met by available services, especially among the I&R providers covering the entire metropolitan area.

  The greatest problem is lack of affordable services, regardless of type.

Three major issues emerged from the survey. These issues indicate problem areas that must be addressed in developing a comprehensive system of respite care services that is responsive to the needs of frail elderly people and the families who care for them at home.

- o There is need for more in-home services.
- o There is need for public education about existing services and service options.
- o There is a pressing need for a uniform definition of respite care, and a practice of statistically categorizing all services to older persons, which when provided relieve their caregivers in the process, as respite care. Without such data, funds for providing respite care will be difficult to obtain, and a more responsive respite care system will go undeveloped.

The Housing Task Force will meet these needs by organizing workshops and other educational programs for I&R providers to obtain uniform definitions and data on respite care, use data to identify gaps in service, and provide technical assistance to community-based groups to provide respite care services that fill these gaps. Based on the Housing Group survey, it is expected that most of the new respite services generated by the project will be in-home services.

BEST COPY AVAILABLE

Goal: Collect data on respite care needs and fill gaps in service by providing technical assistance to help local groups, such that 7 new respite care programs are created which collectively serve 100 elderly and their families.

Action Steps:

1. Organize a technical assistance team of current respite care providers, consumer groups and long-term care facility administrators to develop an education program based upon a report on respite care produced by the Housing Group. The report defines respite care, surveys the state of the art, summarizes the availability of local resources, and describes three models of respite care (facility-based, in-home, and volunteer). The educational program will be directed toward potential consumers, potential providers and current information and referral providers to increase their awareness of the importance of respite care and the need for collecting data on respite care.

2. Technical assistance team helps I&R providers throughout the area collect data on current respite care availability, service requests, client satisfaction with existing service and gaps in service.

3. Technical assistance team uses data collected to identify location and extent of need and gaps in service.

4. Technical assistance team provides technical assistance to small church and community organizations to develop respite care programs that meet local needs.

BEST COPY AVAILABLE

VI. Project Structure

Major activities of the EHTF were conceived of, developed, and carried out through joint efforts of project staff and committee members. Therefore, committees are represented within the EHTF project structure.

Project staff included a part-time housing administrator from MCCoA who, along with a volunteer part-time co-housing administrator for the Evanston Commission on Aging, both of whom supervised the project to ensure that new directions were beneficial to the project's overall growth and well thought out. In addition, the project employed a full-time Project Director at MCCoA who had lead responsibility for day to day operations of the EHTF, its committees, and the generation of ongoing project activities. A full-time Assistant Project Director, was also employed by MCCoA.

A Housing Committee was established within the first month of the project. Composed of Advocacy in Action Group members along with other individuals, it was quickly assembled. This Housing Committee was to provide ideas to direct the project by developing new problem-solving strategies along with new directions for the project to take. Under the Housing Committee's purview, yet functioning as independent committees of their own were the Congregate Housing Committee, the Home Sharing Committee, and the Respite Care Committee. Members for these committees were recruited quickly so that monthly meetings of each occurred from the start of the project. Committee Activity was a very strong point of the project, such that over time, additional committees grew--this will be discussed in a later section.

The continued involvement and commitment of committee participants, coupled with the dedication, networking ability and hard work of the EHTF staff contributed to the success in so many areas.

V. Significant Findings and Events

The Elderly Housing Task Force has accomplished much in the way of creating networks to address problems in social service delivery; to develop policy recommendations; to create new collaborative projects; to sponsor housing; to organize educational housing forums; etc. While much value should be placed in what has already been accomplished, additional value must be placed on the identification of elderly housing problems that were uncovered and analyzed through this project.

Specifically, we have learned that:

- o There is no comprehensive information resource or service to counsel seniors about housing options and their availability.
- o There is need for area-wide market research and education, both for seniors and lending institutions, about home equity conversion, and option with limited but very definite applicability to certain homeowners.

BEST COPY AVAILABLE

- There is an information gap about senior housing needs among local community officials.

- There is no one representing the elderly in local housing activist groups.

- Non-profit sponsors of housing need linkage with experts who can help them finance and develop housing.

- Home-sharing is a cost-effective way for small agencies to meet local housing needs, but agencies need technical assistance and support to start programs.

- There is ongoing need for information, networking, and public policy review in the area of senior housing.

- There is need for more affordable housing alternatives for elderly people in the Chicago area.

- There is no permanent and comprehensive housing center serving the area that can promote development of alternatives and fill these information gaps.

- We need to learn more about existing senior citizen housing facilities and programs and about housing needs and preferences of older people in the Chicago area.

- In order to develop effective senior citizen programs and services, we must enlist the support of influential people at the neighborhood and local community level.

- Municipalities lack information about local senior housing needs and are unable to judge the quality of facilities proposed by real estate developers.

- Real estate developers lack information about geriatric care, social support services, and housing preferences of older people.

- There are no neighborhood- or community-based focal points for collecting, analyzing, and disseminating information on senior housing availability and needs and for advocating for the expansion of senior housing alternatives.

BEST COPY AVAILABLE

VI. Elderly Housing Task Force Accomplishments

A. Congregate Housing Committee

The Congregate Housing Committee has met monthly over the course of the grant period. The following are the significant activities and projects achieved through Congregate Housing Committee and staff involvement:

1. The Congregate Housing Committee sponsored two congregate housing networking luncheons, (attended by approximately 75 persons), bringing together potential housing sponsors, support service providers, real estate developers, architects, lawyers, funders, and others interested in congregate housing development. Several professional working relationships evolved out of these 2 meetings. In addition, project staff created a networking directory for use by housing entrepreneurs and housing advocates to facilitate linkages among various actors in housing development. (See appendix B for a copy of the Networking Directory)

2. The Committee toured 4 congregate facilities and evaluated each on the basis of their structural design, available social services, staffing and management, fee structure, etc. The Committee undertook these tours in order to draft a congregate housing development guideline.

3. Committee members are developing a document called "Guidelines for the Community Development and Regulation of Older Adult Housing" which would be distributed to municipalities in order to educate them on essential features to incorporate in congregate housing facilities. These guidelines would also be made available to housing developers to encourage them to incorporate recommended design and service features in their facilities.

4. Project Director has met with entrepreneur developers to discuss a project whereby MCCoA develops social service packages for residents of their congregate facilities.

5. Project staff worked closely with a south-side community organization and a local urban affairs agency to convert a single-room occupancy (SRO) hotel into low cost congregate housing for the elderly. Rentals from commercial offices within the building's first and second floors would balance lower rentals from the individual apartment units upstairs. The project would provide a simple support service package to seniors including one meal a day, weekly housekeeping, and personal care as needed. Staff participated in many planning meetings and were ready to proceed until it was discovered that the SRO's owner tied the building up in lengthy litigation involving bankruptcy and excessive back taxes.

BEST COPY AVAILABLE

6. Project staff has worked with an order of nuns who is interested in developing congregate housing on their land in the western suburbs, and has linked these sisters with two housing developers. The sisters are seriously considering entering into a joint venture with one of the developers.

7. Project staff linked a south side neighborhood organization wanting to establish a low income congregate housing facility for the elderly with a developer who has much experience in this area.

8. Project staff prepared educational materials on congregate housing for the Niles Township Zoning Board to acquaint them with the concept, in preparation for their review of plans to construct a new congregate facility in Niles, Illinois.

9. Project staff are doing preliminary work to develop social service packages for 2 congregate housing developers.

B. Respite Care Committee

The Respite Care Committee met monthly over the course of the grant period. Three subcommittees as well as several ad hoc committees emerged as outgrowths of the Respite Care Committee.

1. Project Director developed a Respite Care Policy Recommendation paper that was endorsed by over 100 Illinois hospitals, social service agencies, home health care agencies, etc. This policy recommendation paper was used in testimony before the Illinois State legislature and was also presented to the Illinois Department on Aging (IDoA). As a result, its sold endorsements led IDoA to ask MCCoA to prepare the RFP for their congregate residential respite demonstration project. IDoA was so pleased with the RFP materials' quality that they have asked MCCoA to proceed with screening and scoring the completed proposals, as well as with developing a training sequence for the selected demonstration sites. This training would sensitize staff on the special needs of respite care clients and their families. (See appendix C for Policy Recommendation Paper)

2. The Respite Care Committee conducted survey research to substantiate the critical need for respite care services to state and federal funders and policymakers. In cooperation with the Illinois Department on Aging and selected case coordination units, one respite subcommittee collected information on respite care requests statewide which indicated that almost 40% of the needs of family caregivers remains unmet by currently available social services. Another respite subcommittee conducted a survey of hospital discharge planners which documented that a substantial number of expensive institutional days could be saved if periodic respite services are available to family caregivers. The results of this research have been published in MCCoA's newsletter, Focus reaching over 300 agencies, organizations, and institutuions across Illinois. (See appendix D for a copy of Focus)

BEST COPY AVAILABLE

3. The Respite Care Committee is developing a Collaborative Respite Care Volunteer Project in partnership with local churches and social service agencies. Churches would identify families needing respite care, as well as recruit volunteers who can provide companion respite care to those in need. Together the churches and social service agencies would develop the training sessions for the church volunteers, as well as develop the client forms, program guidelines and marketing strategies. To date, the Project Director has met with over 20 churches to interest them in this project.

4. MCCoA is a partner in a new joint respite care delivery project with 5 other agencies, as finalists of the Living at Home Program Grant. As such, MCCoA will work with the Council for Jewish Elderly, Jewish Family & Community Services, Mt. Sinai Hospital, and Japanese American Service Committee in pooling scarce respite care services to serve Chicago's elderly and their family caregivers.

5. Illinois Department on Aging has contracted with MCCoA to develop an institutional respite care demonstration project. Staff has written the initial request for proposal guidelines, application and scoring methodology. MCCoA staff will also assist in the scoring and ranking of completed applications, developing program forms, and coordinating meetings of funded project sites.

C. Home-Sharing Committee

The Home-Sharing Committee met bi-monthly over the course of the grant period. The following are the significant activities and projects accomplished through the Home-Sharing Committee:

1. Six agencies have initiated home-sharing programs as a result of the technical assistance and information provided to them by committee member agencies.

2. Partly as a result of support of agencies represented on the Home-Sharing Committee, PLOWS received $18,000 in CDBG funds for their home-sharing program and Northwest Service Coordination received an award from Governor Thompson for its program.

3. The Committee initiated meetings with a real-estate broker and relocation consultant to devise mutually beneficial ways to refer potential homeseekers and homeowners to agency home-sharing programs.

4. Project staff have become involved in planning goals and direction for a new group, called the Midwest Home-Sharing Network, whose members are home-sharing program providers from Wisconsin and northern Illinois.

BEST COPY AVAILABLE

5. Project staff have prepared a funding proposal to the United Way of Suburban Chicago for funding a Home-Sharing Network. Under this proposal, social service agencies would receive funding to develop and run a home-sharing program, while MCCoA would receive Network Coordinator funds to: (1) identify agencies in the Network's geographic "gap areas" and help them develop programs, (2) advocate with state and federal governments to generate an ongoing funding stream for home-sharingg programs, and (3) network with non-traditional sources such as real-estate agencies and off-campus housing offices to recruit non-traditional clients for matching. This resulted in commitment from 4 suburban agencies (members of our Home-Sharing Committee) to develop home-sharing programs if funding is granted.

6. MCCoA is recognized as a key linkage agency for home-sharing, and as such receives and refers many phone calls pertaining to home-sharing per month to direct service agencies. In addition the National Shared Housing Resource Center in Philadelphia recognizes MCCoA as a lead home-sharing agency in the midwest.

D. Education Activities

1. Project staff developed a six-part Forum Series on housing alternatives for the elderly. The Series, which ran monthly from February through July, 1985, covered Home-Sharing, ECHO, and Accessory Housing, Respite Care, Home Equity Conversion, Congregate Housing/Life Care, Financing Congregate Housing, and Policy Issues in Housing. Presenters included such local and national experts as Patrick H. Hare, and Leo Baldwin of Washington, DC, William Perkins of Madison, Wisconsin, Mary Nelson of Bethel Housing in Chicago, Elizabeth Hollander, Chicago Planning Commissioner, and Zirl Smith, past Executive Director of Chicago Housing Authority. The Forums were attended by an approximate total of 500 people, many of whom subsequently became involved in the Housing Task Force Project. The Forum Series was videotaped for further educational uses. (See appendix E for brochure)

2. Project Director presented an educational session on Housing Options for Older Persons at PLOWS Council on Aging's May 22, 1985 Seniorama Day. After learning about the concept, one senior citizen participant contacted one of the home-sharing network pilot to seek a housemate for home-sharing.

3. In July, 1985, Project Director gave a presentation on Respite Care issues to Information & Referral Providers at the Northeastern Illinois Workers in Aging Conference in DeKalb, Illinois.

4. In October, 1985, Project Director gave a presentation to the Illinois Council on Aging on housing needs of the elderly, focusing on the recommendations she helped prepare for the elderly component of the Illinois State Housing Plan.

BEST COPY AVAILABLE

5. In cooperation with the Region V Administration on Aging (AoA), the Project Director co-sponsored a November 6-7, 1985 Conference for Region V Administration on Aging staff. On November 6th, representatives from Region AoA (Illinois, Ohio, Wisconsin, Michigan, Minnesota, and Indiana) presented their state's elderly housing initiatives. On November 7th, Region V AoA representatives attended a morning conference on Home Equity Conversion, followed by a luncheon meeting where they could ask specific questions of the presenters.

6. Project Director, while participating on the planning committees for both the 1986 Governor's Aging Network Conference and 1986 Mid-America Conference on Aging, developed conference sessions on elderly housing and respite care.

7. Project staff have provided individual agencies with information on available home-sharing, home-equity conversion, congregate housing, and respite care programs as well as conceptual information on these concepts. Staff have also provided developers, market research firms and government offices from around the country with information on the Chicago area and national elderly housing market.

8. Project Director led a round-table presentation of MCCoA's achievements with regard to respite care, entitled "Advocacy and Coalition Building Around Respite Care Needs." Twenty individuals, representing agencies from around the country, attended.

E. Media Activities

1. In February, 1985, the Housing Administration appeared on a CBS-TV talk show providing information on elderly housing.

2. In April, 1985, the Project Director was interviewed by a representative of the American Medical News Journal regarding the issue of respite care.

3. In June, 1985, MCCoA's Executive Director appeared on 2 talk shows (WFLD-TV/Channel 32 and WGN-TV/Channel 9) during the month of June and talked about elderly housing issues in general.

4. Housing Administrator was interviewed by the Real-Estate Editor of the Chicago Sun-Times, and was quoted in an article on senior housing which appeared in the July 5, 1985 edition of the Chicago Sun-Times.

5. In October, 1985, Project Director was quoted in a monthly newsletter, "The Neighborhood Works," concerning the housing needs of low-income elderly who live in single room occupancy (SRO) hotels. This publication is circulated to housing specialists in the Chicago area and around the country.

BEST COPY AVAILABLE

6. Project Director was quoted extensively on elderly housing options in a special feature of the Chicago Sun-Times Real-Estate section dated July 4, 1986.

E. Policy/Advocacy

1. Project staff participated in a Governor's Task Force to create an Illinois State Housing Plan to be used for legislative planning initiatives in Illinois. Project staff represented the project on the Adaptable Housing for the Elderly Committee and The Tenant Landlord Relations Committee, each of which submitted a policy recommendation plan to the Governor.

2. In October, 1985, Project Administrator testified before the Illinois State legislature in Springfield on the respite care needs of family caregivers.

3. Project Director has provided the Mayors, Village Planners and Directors of Senior Citizen Commissions of several communities with background information on elderly housing alternatives. Some of these communities in turn have used this information to amend zoning codes that permit a greater variety of elderly housing in their area.

4. Project Director regularly attends meetings of local housing advocacy groups including: (1) State Housing Action Coalition, (2) Chicago Coalition for the Homeless, (3) Illinois Coalition for Affordable Housing, and (4) Regional Housing Action Study Group. These groups are trying to leverage the earmarking of a percentage of funds from the Illinois Housing Development Authority for low income housing development.

BEST COPY AVAILABLE

VII. New Program Initiatives

The findings of the extensive work of the Task Force to Create Affordable Housing for the Elderly has directed our attention towards the local community--indeed the neighborhood--as the best place to initiate developments and improvements in senior housing.

Project staff and Respite Care Committee members have developed a neighborhood-based Collaborative Volunteer Respite Care Program. On the premise that people, older adults in particular tend to go first for help to informal support networks--friends and relatives--staff and committee members will recruit and train neighborhood volunteers to provide in-home companion respite care to local families in need of assistance with caregiving responsibilities.

We are jointly working on the northwest side of Chicago in the community areas of Albany Park and Irving Park with Lutheran Community Services for the Aged, who are pursuing the project in the northwest suburbs of Chicago. We have received commitments from 8 churches (in the two areas) to assist in the recruitment of families and volunteer respite care workers.

The Respite Care Committee who will act as an advisory board to this project has helped to develop the program--from the intake forms to the volunteer recognition luncheons--it was a collaborative effort. We have submitted the proposal to the Retirement Research Foundation, the Chicago Community Trust, and the Wheat Ridge Foundation. We hope to begin accepting families in Spring, 1987.

Project staff has also begun to develop 4 local housing councils in various communities of metropolitan Chicago. With the assistance of council members (made up of community leaders and residents) staff has developed a needs assessment which will help to determine the housing needs of local residents. The staff of MCCoA (again with the help of council members) will administer the needs assessment to seniors in the local areas. The results of each needs survey will help the local residents to decide what housing options are needed in their community as well as help housing developers and sponsors to determine the appropriate housing (if any) to produce in these areas.

We presently have tentative Community Development Block Grant Funds (CDBG) for two of the councils within the city of Chicago. We also have interest from the Borg-Warner Corporation to sponsor an additional council in the city. The city of Evanston is strongly interested in the needs assessment for their housing plans. We are presently approaching various Evanston businesses for funds.

BEST COPY AVAILABLE

In addition to the exciting programs above, MCCoA staff is developing a Volunteer Home Repair Program to work in conjunction with MCCoA's CDBG funded Senior/Handicapped Home Maintenance Program. Because of the limited income requirements and the limited amount of funding, MCCoA has recruited skilled volunteers to do minor home repairs for seniors on the northwest side of Chicago. To pay for the materials needed in the program, MCCoA has requested funds from 30 organizations and corporations traditionally interested in volunteer programs.

VIII. Summary

Our experience has proven that coalition building involving a wide array of professional sectors can lead to the development of many positive activities in the area of elderly housing. Our congregate committee, for example, pooled the expertise and resources of professionals who were not accustomed to working together, real estate developers, medical staff, social service providers, architects, housing managers, and zoning officials. Together the committee developed an in-depth guideline on congregate housing development.

The same is true for our respite care committee. The collaborative efforts of social service providers, church leaders, educators, and health professionals helped to create the Collaborative Volunteer Respite Care Program which will serve families in need of assistance with caring for their frail older relatives.

Our Elderly Housing Task Force work has also revealed to us that the elderly housing field is very undefined, that many sectors are unfamiliar with how to proceed with housing development, and that few comprehensive housing resources exist. Our findings specifically indicate the following:

- There is no comprehensive information resource or service to counsel seniors about housing options and their availability.
- There is need for area-wide market research and education, both for seniors and lending institutions, about home equity conversion, an option with limited but very definite applicability to certain homeowners.
- There is an information gap about senior housing needs among local community officials.
- There is no one representing the elderly in local housing activist groups.
- Non-profit sponsors of housing need linkage with experts who can help them finance and develop housing.
- Developers of congregate and retirement housing need direction in creating service packages.
- Home-sharing is a cost-effective way for small agencies to meet local housing needs, but agencies need technical assistance and support to start programs.

BEST COPY AVAILABLE

- There is ongoing need for information, networking, and public policy review in the area of senior housing.

- There is need for more affordable housing alternatives for elderly people in the Chicago area.

- There is no permanent and comprehensive housing center serving the area that can promote development of alternatives and fill these information gaps.

We expect that such gaps in resources and linkage may occur in communities across the country. Therefore, we cite these as areas meriting further community attention and action.

In conclusion, the work of the Task Force to Create Affordable Housing Alternatives for the Elderly was very fruitful. A great amount of information was gathered, many professionals shared information, and now and in the future, seniors in the metropolitan Chicago area and beyond will benefit from the work accomplished here.

BEST COPY AVAILABLE

IX. NOTES

1/ Final Report, the 1981 White House Conference on Aging, vol. 3, Recommendations, Post-Conference Survey of Delegates. Washington, D.C., November, 1981. Committee 8 Housing Alternatives recommendations referred to are numbers 258, p. 130; 254, p. 129; 275, p. 132; 277, p. 132; Additional View, p. 135; and 257, p. 130, respectively.

2/ Nancy C. Ackerman, unpublished paper, Metropolitan Chicago Coalition on Aging, "Trends in Housing for the Elderly," Chicago, Illinois, September, 1983.

3/ ibid.

4/ Michael Gutowski and Tracey Field, The Graying of Suburbia, The Administration on Aging, Washington, D.C., 1980.

5/ Congressional Record - Senate, Washington, D.C., May 25, 1983, S7575.

6/ Metropolitan Program Development Division, United Way of Metropolitan Chicago, unpublished paper, "Congregate Housing," Chicago, Illinois 1979.

7/ ibid.

BEST COPY AVAILABLE

X. Appendices

A. Advocacy in Action Housing Group Recommendations

B. Congregate Housing Networking Directory

C. Respite Care Policy Recommendation Paper

D. MCCoA Focus, Summer, 1986

E. MCCoA 1985 Forum on Aging Series Brochure

BEST COPY AVAILABLE

MCCoA

Metropolitan Chicago Coalition on Aging

Board of Directors

OFFICERS
Arthur H. Kruse, PRESIDENT
Peter Lueck, VICE PRESIDENT
Commonwealth Edison Company
Masaru Nambu, TREASURER
Japanese American Service Committee
Charles Johnson, SECRETARY
Region II Area Agency on Aging

DIRECTORS
Robert J. Abrams
Chicago Department on Aging and Disability
Madeline Armbrust
Senior Centers of Metro Chicago
Carlos Ballesteros
Illinois Bell Telephone Co.
Harold Bayless
Retired from Illinois Department of Public Aid
Shirley Brassell
Operation ABLE
Anthony Chirobello
Peat, Marwick, Mitchell & Co.
David L. Daniel
Retired from Illinois Department of Public Aid
Dolores Daniels
National College of Education
Lawrence Deever
Retired from Chicago Tribune
Dorothy B. Durkin
The Northern Trust Company
Jane Garvelmann
Retired from United Charities of Chicago
Isabella Greenblatt
Raymond Hartstein
Brunswick Corporation
Robert J. Havighurst
The University of Chicago
Judith Hirschel
Junior League of Evanston
Msgr. Thomas J. Hollbrook
Catholic Charities of Chicago
Mary S. Kennedy
Sears Roebuck and Co.
Edward Klemm
Allstate Insurance Company
Martha E. Langer
Jewish Family and Community Services
Yuri L. London
London and Company, Inc.
S.E. Mackinnon
Retired from City of Chicago Department of Planning
Dorothea Matthews
Baxter Travenol Laboratories, Inc.
Florence Murdoch
Chicago-based Blue Cross/Blue Shield
Alfred Nesby
Illinois Department on Aging
Anne M. Perlberg
Johnston R. Bowman Health Center for the Elderly
J. Ron Pippin
Brownsville House Society
Sharon Riley
Levit & Miller Ltd.
Dorian Shansky
Southwest Suburban Center on Aging
David Wandersee
Continental Bank
Rina Zenaro
Interlake, Inc.

Dennis R. Rasel
Executive Director

RECOMMENDATIONS

OF THE

METROPOLITAN CHICAGO COALITION ON AGING

ADVOCACY IN ACTION PROGRAM

HOUSING GROUP

February, 1984

53 West Jackson Boulevard • Suite 919 • Chicago, Illinois 60604 • (312) 922-5890

BEST COPY AVAILABLE

CONTENTS

Introduction	23	i
Housing Group Members	24	ii
Recommendations of the Affordable Housing Group	26-29	2
Recommendations of the Respite Care Group	30-31	6
Recommendations of the Life Care Group	32	8

BEST COPY AVAILABLE

INTRODUCTION

In January, 1983, the MCCoA Board of Directors made a commitment to strengthen the advocacy efforts of the Coalition. The Advocacy in Action program, established in the Fall of 1983, is a result of that commitment. Advocacy in Action uses collaborative problem-solving techniques applied to problems affecting the elderly and directed toward improving the lives of Chicago-area older people.

The Advocacy in Action approach rests on the assumption that problems affecting the elderly tend to involve all major sectors of society. No one sector, therefore, can solve these problems alone; their solutions require collaborative efforts. As an association of health and human service agencies, corporations, government agencies, and concerned individuals, MCCoA itself is built on a foundation of collaborative effort. The Advocacy in Action program is thus a natural outgrowth of MCCoA, taking advantage of the organizational variety and lines of communication already in place.

The success of the Advocacy in Action program is due to the knowledge and dedication of its participants. The first Advocacy in Action program brought together twenty-two representatives of local business, voluntary and governmental organizations to recommend solutions to housing problems affecting older people. The Housing Group organized itself into three subgroups, each examining a different aspect of housing: affordable housing; respite care; and life care. The groups met weekly for twelve weeks. The recommendations in this report are the results of their work.

BEST COPY AVAILABLE

THE HOUSING GROUP

Nancy Ackerman, Housing Group Coordinator, MCCoA

Affordable Housing

Mary Gibb (Group Chairman), Evanston Commission on Aging
Bob Adams, The Housing Agenda
Jill Allen, Northwest Community Services
Joanne Merritt, Hull House Association
Gerilyn Miller, Chicago Department on Aging and Disability
Beverly Nash, MCCoA
Kathy Pistone, Senior Shared Housing
Vivian Sosin, Chelsea House

Respite Care

Harold Bernt (Group Chairman), United Charities of Chicago
Susan Grossman, MCCoA
Anna Perlberg, Johnston R. Bowman Center
Jane Plonka, Hines VA Extended Care
Carol Reagan, Suburban Cook County Area Agency on Aging
Irene Smith, Hyde Park Neighborhood Club

Life Care

Roger Deattie (Group Chairman), LIBRA Real Estate
Phyllis Badesch, Aid for Independent Living
Dennis Bozzi, MCCoA
Eulene Cohen, Council for Jewish Elderly
Len Gabrielson, Life Care Retirement Communities, Inc.
Jean Jorjorian, Johnston R. Bowman Center
Joy Nance, Center of Concern
Sister Mary Paul, Resurrection Retirement Community

BEST COPY AVAILABLE

RECOMMENDATIONS OF THE AFFORDABLE HOUSING GROUP

Problem: Lack of Creative Options for Affordable Housing

After sifting through many possible options for affordable housing, the group carried out an in-depth study of eight affordable housing options: rent regulations; increasing subsidized housing stock; creating the support services needed to enable older people to use options; displacement controls; house sharing; congregate housing; home equity conversions; and accessory/echo apartments.

The next step was to outline a project for each option that would at least partially solve the problem by increasing, promoting, educating or advocating for each option. The group then developed uniform criteria to measure the impact and practicality of each project under consideration:

- Can MCCoA have an effect on the issue?
- Cost
- Impact
  a) number and range of people served
  b) effects on policy
- Speed of implementation
- Consumer involvement
- Immediacy of the problem
- Certainty of outcome

The result was a detailed set of recommendations for three projects. Implementation of those projects will be at the discretion of MCCoA, but the group recommends that all three projects be implemented. Each project attacks the problem from a different angle and, taken together, can have a substantial impact on the lack of affordable housing for the elderly. Projects are structured to run either concurrently or sequentially.

Solution: Shared Housing

Goal: Increase efficiency and possibility of matches by networking among small groups and providing technical assistance and resources to old and new groups.

Action Steps: 1. Organize a core group of organizations with shared housing programs, consumer groups, governmental bodies and others. Some potential group members are:

Council for Jewish Elderly	AARP
Project Share of DuPage County	Ill. Department on Aging
Senior Shared Housing	Gray Panthers
Northwest Community Services	city planners
Area Agencies on Aging	

2. Core group plans a system of networking that might:

   a) get funding or donated computer time to put house sharing information on a central computer;

BEST COPY AVAILABLE

b) find centralized meeting location for bi-monthly meetings;

c) create a central clearinghouse for matches;

d) plan information, education and promotion to:

1) educate and inform potential consumers (young, old, single persons and families)

2) promote the creation of new house sharing

3) advocate with zoning commissioners, legislators and city planners

4) use techniques and tools such as film, newsletters, spokespersons, public access cable TV.

Time Lines:

core group convened	- 2 months
network in place	- 3 months
3 major educational programs completed	- 8 months
TOTAL:	13 months

Rationale:

1. There is not enough subsidized housing (existing or planned) available to meet the demand.
2. There is a lack of affordable alternatives. Shared housing is a viable, affordable alternative.
3. Shared housing gives companionship, security and independence to older people.
4. Shared housing affects home owners and renters.
5. Shared housing could promote intergenerational living arrangements, thus insuring that older people do not become isolated.
6. Shared housing enables older people to keep their homes.
7. Shared housing arrangements can vary to accommodate individual differences and needs.
8. Elements of a shared housing network already exist, based on group members: Shared housing program administrators would be eager to participate.
9. This project meets MCCoA criteria of collaboration and metropolitan area impact.
10. This project would be cost efficient; the greatest cost would be staff time and that would be shared among a number of groups.

Solution: Congregate Housing

Goal: To develop and implement a variety of congregate housing models for different need levels.

BEST COPY AVAILABLE

Action Steps: 1. Organize a small group to plan a half-day conference on congregate housing for people who will be invited to become project participants and together form the project advisory group. Some potential participants are:

- Chicago Housing Authority
- Council for Jewish Elderly
- DuPage County
- AoA
- HUD
- Chelsea House and other privately owned congregate facilities
- Real estate developers
- Ill. Assn. of Homes for the Aging
- Bankers and financiers
- Major foundations such as Retirement Research
- Donor's Forum
- Sisters of Mercy and other church groups
- Home health agencies (for support services)
- Historic Preservation groups (for rehabbing)
- U. of Ill. housing center
- H.O.M.E.
- Bethel Housing
- Bethel's funders
- Municipalities
- Real estate writers
- Public service media reps.
- AARP
- Gray Panthers
- Other senior groups
- AAA advisory council
- Alderman
- Other legislators

2. Survey conference participants for interest in various congregate housing models

3. Organize task forces out of the larger group to investigate models. Some models might be:

   a) rehabilitation of existing buildings for congregate housing

   b) bringing support services in to existing congregate facilities

   c) clustering small congregate units to share services

   d) find alternatives to government funding for new congregate buildings

   e) advocate for changes needed in legislation affecting congregate housing

   f) program for consumer education about congregate housing

4. Determine appropriate sponsors for each model and negotiate with sponsors for realization of each model

5. Use information and experience of project to create a resource center on congregate housing

BEST COPY AVAILABLE

Time Lines:

organize small planning group	- 2 months
conference	- 4 months
prepare models, critique and revise models, advisory group approves models	- 6 months
implement models	- 1-2 years
TOTAL:	2-3 years

Rationale:

1. There is a lack of affordable housing alternatives; congregate housing can be an affordable option.
2. There is a lack of congregate housing facilities; this project looks at ways to get more and ultimately creates more facilities.
3. This project encompasses many different forms of congregate housing and will provide information on which are most viable and, potentially, create new forms.
4. Congregate housing gives companionship and security to older people.
5. Congregate housing can prevent institutionalization.
6. Congregate housing can vary to accommodate individual differences and needs.
7. Based on group members' level of interest, there would be enthusiasm for this project among providers.
8. The project would be costly because of its lengthy time frame, but costs may be covered through project funding.
9. This project meets MCCoA criteria of collaboration and metropolitan impact.
10. The results of this project could have a substantial and long-term impact on congregate housing nationally.

<u>Solution: Displacement Controls</u>

Goal: To protect elderly people from displacement.

Action Steps:

1. Organize a group of senior citizens and housing activists to plan and implement strategy. Some potential participants are:

   The Housing Agenda
   Gray Panthers and other senior citizen groups
   City legislators
   Lawyers representing displaced people
   Coalition for the Homeless

2. Investigate existing proposals relating to displacement, such as:

   a) Tenants Bill of Rights

BEST COPY AVAILABLE

b) Condo conversion controls

c) Single room occupancy units disappearance

3. Prepare position statement.

4. Develop strategy for advocacy campaign which would take into account real estate developers' and legislators' points of view. Possible strategies are:

a) Rally

b) March

c) Publicity

d) Conference

e) Mailings

f) Meetings of legislators

Time Line:

organize group	- 2 months
prepare position paper	- 3 months
develop strategy	- 2 months
advocacy campaign	- open ended
TOTAL:	8 - 12 months

Rationale:

1. Displacement of the elderly is a pressing problem.
2. Involuntary displacement can adversely affect all aspects of a person's life.
3. There are currently proposals to prevent displacement before the Chicago City Council. The project capitalizes on this.
4. The project would also capitalize on the fact that the Washington administration has a proposed policy against displacement.
5. This project would help create an elderly constituency among housing activists.
6. This project has the greatest potential for consumer participation among the three recommended.
7. This project could have a significant and long-term impact on housing policy.
8. While the greatest need for displacement controls is in Chicago, there is also need in the suburbs, due to condo conversion. The project would be constructed to have the broadest possible impact.
9. This project meets MCCoA criteria of collaboration.
10. This project is relatively short-term and low-cost.

BEST COPY AVAILABLE

RECOMMENDATIONS OF THE RESPITE CARE GROUP

Problem: Lack of a Comprehensive System of Respite Care Services

In defining its problem, the Respite Care Group discovered four major problem areas related to respite care service in the Chicago metropolitan area:

- Lack of a uniform definition of respite care and uniform data about respite care service
- Need for public education about existing services and service options
- Need for more in-home respite service
- Need for financial assistance or subsidized respite service

The Group's recommendations address these problem areas. Taken together, the various solutions recommended aim toward the creation of a more comprehensive respite care service system. The Respite Care Group recommends that NCCoA undertake some, if not all, of these solutions.

During the course of the Group's meetings, the State of Illinois passed the Respite Care Demonstration Act which authorizes respite services for disabled adults and establishes fiscal and eligibility standards. If funded, this Act could provide support for the Respite Care Group recommendations.

Solution: Give Respite Care High Priority

NCCoA should give respite care a high priority and do all it can to facilitate the development of more respite care programs. Strategies could include:

1. Lobbying in support of respite care legislation;
2. Alerting constituent groups to respite care issues;
3. Facilitating the development of services in accordance with the Respite Care Demonstration Act.

Solution: Educational Program for Provider Agencies

NCCoA should plan and participate in educational activities with information and referral service providers. This educational programming will focus on defining respite care services and collecting data about them to document service need for funding.

Solution: Public Education Program

NCCoA should undertake educational activities to increase awareness of respite care services and service options among providers and the general public. Activities could include:

BEST COPY AVAILABLE

1. Workshop on respite care;

2. Development of educational materials;

3. Distribution of the Group's "Report on Respite Care".

Solution: Technical Assistance Program

MCCoA should attempt to get funding for providing technical assistance to community groups wanting to develop local programs of affordable in-home respite care services. In developing a proposal, MCCoA should collaborate with the Council of Churches and Synagogues, which has identified a need for respite care services within their congregations and has expressed interest in providing such services.

The technical assistance program could be a two-year demonstration project, to be expanded, if successful, at the end of the two-year period.

Program elements:

1. Provide consultation to help community organizations:
   a) identify prospective clients;
   b) recruit volunteers to provide short-term respite;
   c) recruit providers of in-home overnight respite;

2. Design and coordinate a training program drawing upon the resources of member agencies;

3. Collect data regarding use of the service and the recruitment of service providers;

4. Evaluate the program (client satisfaction, community group feedback);

Staff: The program coordinator should be an MSW with experience in community organizing.

Budget: Salaries; recruitment, training and evaluation materials; administration and overhead.

BEST COPY AVAILABLE

RECOMMENDATIONS OF THE LIFE CARE GROUP

Problem: Lack of Life Care Programs for Lower Income Older People

Life Care is a popular and fast-growing retirement living concept. Life Care facilities offer residents a living unit for lifetime use and an array of social, health and recreational services. Entrance fees are required, the amount of which is based upon the size and type of housing unit. In addition to the entrance fee, monthly service fees are standard, the amount of which is also dependent on the unit.

Life Care programs, by definition, are designed for and appeal to older people with above-average assets and income (the range of entrance fees at Beacon Hill, for instance, is from $59,500 to $115,000; monthly service fees from $640 to $995). These programs offer residents security in their later years. The question the Group focused on was whether the life care model could be modified for older people with lower incomes and assets.

The Group identified locations within the metropolitan area with potential demand for modified life care and analyzed the life-care services needed and the cost of providing them.

Solution: Educational Program to Stimulate Interest

Although the Group is still working to develop more specific recommendations, it was agreed that MCCoA sponsor a seminar on the question of modified life care, inviting participants from both voluntary agencies and business to help analyze the feasibility of modified life care. It was also agreed that MCCoA print a brochure for older people and their families on how to select and evaluate a life care facility.

BEST COPY AVAILABLE

MCCoA

Congregate Housing Networking Directory

Senior Housing Center
Metropolitan Chicago Coalition on Aging
53 West Jackson Boulevard
Suite 918
Chicago, Illinois 60604
(312) 922-5890

BEST COPY AVAILABLE

INTRODUCTION

MCCoA's Senior Housing Center is pleased to publish this Congregate Housing Networking Directory. The development of congregate housing requires collaboration among professionals who are not accustomed to working together: real estate developers, architects, housing managers, and zoning officials, with doctors, nurses, and social service providers. In order to foster a dialogue among these professional circles, MCCoA convened two Forums in May and June of 1985 which explored establishing and funding a range of congregate housing facilities.

The Forums were followed by Round Table Luncheons which gave participants a chance to meet and discover ways they could work together toward development of congregate housing. The Round Tables each drew a group of 30 people committed to expanding the availability of congregate housing in the Chicago area. Those attending wanted to share their expertise with others, and lively discussion, focused on collaborative project ideas, filled the afternoon.

This Congregate Housing Directory was developed from the responses of those who attended our May and June 1985 Round Tables and others active in the elderly housing field who have asked to be included. These individuals are listed (and cross-listed) under professional categories including: architects, attorneys, housing managers, non-profit sponsors, social service providers, etc. The Directory also notes the activities in which each listed individual is willing to participate and share expertise and includes phone numbers and addresses.

We hope this Directory will foster further collaborative effort toward developing congregate housing, in that it will quickly lead its readers to valuable contacts in the field whose input is an essential pre-requisite for initiating an actual project. We thank those who have agreed to be listed. Anyone wanting to be listed, deleted, or revised in future editions, should feel free to call me at (312) 922-5890.

Gerilyn Miller-Merens

Gerilyn Miller-Merens
Project Director
Senior Housing Center

BEST COPY AVAILABLE

Table of Contents	Page
Preface	i
Introduction	ii
Architects	1
Attorneys	3
Builder/Rehabbers	4
Developers	6
Facilitator/Networkers	9
Financiers	15
Housing Managers	16
Non-Profit Sponsors	19
Public Relations	21
Real Estate	22
Researcher/Planner	23
Service Provider	25
Alphabetized Index	31

BEST COPY AVAILABLE

ARCHITECTS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Carl Awsumb Principal Williamson/Awsumb/Architects 900 Lincoln American Tower Memphis, TN 38103 (901) 526-2800	X							X			
2. Fred L. Bernheim, F.A.R.A. President Bernheim + Kahn, Ltd., Architects 211 West Wacker Drive Chicago, IL 60606 (312) 236-1333 (See also: BUILDER/REHABBER - DEVELOPERS)	X	X	X	X			X	X			
3. Daniel Cinelli Architect O'Donnell, Wicklund & Pigozzi Architects, Inc. 3239 Arnold Lane Northbrook, IL 60062 (312) 498-5700	X	X	X				X	X			
4. Gerald R. Haselhuhn Senior V.P. Health Care Schmidt Garden & Erikson Inc. Architects & Engineers 104 S. Michigan Ave. Chicago, IL 60603 (312) 332-5070 (See also: FACILITATOR/ NETWORKER - BUILDER/REHABBER)	X		X	X	X		X	X			

BEST COPY AVAILABLE

ARCHITECTS: (continued)

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
5. Philip A. Hickman Senior Vice President Harris Webber, Ltd. 666 Dundee Rd. - Suite 903 Northbrook, IL 60062 (312) 272-9686 (See also: DEVELOPER- FINANCIER - MANAGER)	X	X	X	X	X	X	X	X	X	X	
6. Nancy J. Hubbard President, Hubbard & Hubbard Architects 120 N. Green St. Chicago, IL 60607 (312) 421-6354)	X	X		X							
7. Jack Murchie Architect Architects International 18 S. Michigan Avenue Chicago, IL 60603 (312) 236-4515	X	X						X			
8. Lenwood Robinson Construction Specialist Chicago Rehab Network 53 W. Jackson - Suite 815 Chicago, IL 60604 (312) 663-3936	X	X	X	X	X			X			

BEST COPY AVAILABLE

ATTORNEY:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. F. Willis Caruso Attorney Isham, Lincoln & Beale General Counsel - Metropolitan Housing Development Corp. Three First National Plaza Chicago, IL 60602 (312) 558-7455	X		X								X

BEST COPY AVAILABLE

BUILDER/REHABBERS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Fred L. Bernheim, F.A.R.A. President Bernheim + Kahn, Ltd., Architects 211 West Wacker Drive Chicago, IL 60606 (312) 236-1333 (See also: ARCHITECTS DEVELOPERS)	X	X	X	X			X	X			
2. Marjorie Beyer, MPA Director, Planning & Development- Geriatric Housing & Support Services Chatham Center 753 E. 79th St. Chicago, IL 60619 (312) 874-5675 (See also: DEVELOPER - SERVICE PROVIDER - MANAGER - FACILITATOR/NETWORKER	X	X	X				X		X	X	
3. Salvatore V. Ferrara Executive Vice President Metropolitan Housing Development Corporation 29 E. Madison St. Chicago, IL 60602 (312) 236-9673 (See also: DEVELOPER - FINANCIER -MANAGER)	X	X	X			X			X		X

BEST COPY AVAILABLE

BUILDER/REHABBERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
4. Gerald R. Haselhuhn Senior V.P. Health Care Schmidt Garden & Erikson Inc. Architects & Engineers 104 S. Michigan Ave. Chicago, IL 60603 (312) 332-5070 (See also: ARCHITECT - FACILITATOR/NETWORKER)	X		X	X	X		X		X		
5. Bill Levy, President Harper Realty, Inc. 900 W. Jackson Blvd. Chicago, IL 60607 (312(666-2666 (See also: DEVELOPER - SERVICE PROVIDER)	X	X	X	X							

BEST COPY AVAILABLE

DEVELOPERS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Phyllis U. Badesch Badesch & Associates, Ltd. 821 Case St. Evanston, IL 60202 (312) 328-3309 (See also: FACILITATOR/NETWORKER REAL ESTATE)	X	X	X	X	X	X	X	X	X	X	
2. Fred L. Bernheim, F.A.R.A. President Bernheim + Kahn, Ltd., Architects 211 West Wacker Drive Chicago, IL 60606 (312) 236-1333 (See also: ARCHITECTS - BUILDER/REHABBERS)	X	X	X	X			X	X			
3. Marjorie Beyer, MPA Director, Planning & Development Geriatric Housing & Support Services Chatham Center 753 E. 79th St. Chicago, IL 60619 (312) 874-5675 (See also: BUILDER/REHABBER - SERVICE PROVIDER - MANAGER - FACILITATOR/NETWORKER)	X	X	X				X		X	X	
4. Diane Carstens Director or Planning & Research LeisureCare, Inc. Leisure Square Mall 1000 State Road 70 Lakewood, NJ 08701 (201) 370-0446 (See also: RESEARCHER/PLANNER)	X	X	X		X						

BEST COPY AVAILABLE

DEVELOPER (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
5. Jerry Falcon, President LeisureCare, Inc. 666 Dundee Rd. - Suite 1903 Northbrook, IL 60062 (312) 272-7580	X	X									
6. Salvatore V. Ferrera Executive Vice President Metropolitan Housing Development Corporation 29 E. Madison St. Chicago, IL 60602 (312) 236-9673 (See also: BUILDER/REHABBER - FINANCIER - MANAGER)	X	X	X			X			X		X
7. Neil Gaynes, President Gaynes & Associates 481 Ridge Highland Park, IL 60035 (312) 831-4475	X										
8. Philip A. Hickman Senior Vice President Harris Webber Ltd. 666 Dundee Road, Suite 903 Northbrook, IL 60062 (312) 272-9686) (See also: ARCHITECT - FINANCIER - MANAGER)	X	X	X	X	X	X	X	X	X	X	
9. Bill Levy, President Harper Realty, Inc. 900 West Jackson Chicago, IL 60607 (312) 666-2666 (See also: SERVICE PROVIDER - BUILDER/REHABBER)	X	X	X	X							

BEST COPY AVAILABLE

DEVELOPERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
10. Claudette R. Miller President/Administrator Unique Living Chateau 2719 E. 75th St. Chicago, IL 60649 (312) 978-5206 (See also: SERVICE PROVIDER - MANAGER)	X	X	X							X	
11. Mark Schulte Senior Project Manager Rescorp Development, Inc. 7 South Dearborn Chicago, IL 60603 (312) 269-0681	X	X	X	X	X			X			
12. Carol M. Stabirski Vice President - Management/Marketing Harris Webber Ltd. 666 Dundee Rd. - Suite 903 Northbrook, IL 60062 (312) 272-9686 (See also: MANAGER)						X	X		X	X	

BEST COPY AVAILABLE

(I AM WILLING TO:)

FACILITATOR/NETWORKERS: (those who link individuals/agencies to others with complimentary resources taht could lead to collaborative projects)

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Phyllis U. Badesch Badesch & Associates, Ltd. 821 Case St. Evanston, IL 60202 (312) 328-3309 (See also: DEVELOPER - REAL ESTATE	X	X	X	X	X	X	X	X	X	X	
2. Marjorie Boyer, MPA Director Planning & Development - Geriatric Housing & Support Services Chatham Center 753 E. 79th St. Chicago, IL 60619 (312) 874-5675 (See also: DEVELOPER - MANAGER - BUILDER/REHABBER - FACILITATOR/NETWORKER	X	X	X				X		X	X	
3. Ann Brooks Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, Michigan 48104 (313) 461-9185 (See also: RESEARCHER/PLANNER)	X	X	X	X	X		X		X	X	
4. Mrs. Ted Cohn Joseph-Sarah Levy Center - J.C.C. 5701 N. Sheridan Rd. Chicago, IL 60660 (312) 728-5858	X										

BEST COPY AVAILABLE

(I AM WILLING TO:)

FACILITATOR/NETWORKERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
5. Donna Drinan Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, Michigan 43104 (313) 461-9185 (See also: RESEARCHER/PLANNER)	X	X	X	X	X						
6. Alan R. Factor Market Research Consultant 3329 W. Crain St. Skokie, IL 60076 (312) 679-6115/ 674-9889 (See also: RESEARCHER/PLANNER		X	X	X	X		X		X	X	
7. Linda A. Gall 1277 S. 2nd Des Plaines, IL 60018 (312) 298-7071	X	X	X							X	
8. Wayne T. Guthrie Chairman, 2 housing committees, Du Page Senior Citizens Council Region 2, AAoA 4828 Oakwood Ave. (home address) Downers Grove, IL 60515 (312) 968-3417	X	X	X								

BEST COPY AVAILABLE

FACILITATOR/NETWORKERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
9. Gerald R. Haselhuhn Senior V. P. Health Care Schmidt Garden & Erikson Inc. Architects & Engineers 104 S. Michigan Ave. Chicago, IL 60603 (312) 332-5070 (See also: ARCHITECT - BUILDER/REHABBER)	X		X	X	X		X		X		
10. Leslie Knight Regional Director American Association of Homes for the Aging (AAHA) 501 W. Surf Chicago, IL 60657 (312) 472-4977 National Office of AAHA: 1129 20th St. N.W. #400 Washington, DC 20036 (202) 296-5960 Contact: Steven Hornburg Housing Analyst	X	X	X								
11. Jan Logan 210 Massachusetts Ave., Apt. 1 Arlington, MA 02174 (617) 646-9510	X	X	X		X		X				

BEST COPY AVAILABLE

(I AM WILLING TO:)

FACILITATOR/NETWORKERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
12. Sally S. Mann Coordinator, Community Education Council for Jewish Elderly 7457 N. Western Chicago, IL 60626 (312) 570-7000	X	X					X				
13. Cathy Michaelson Coordinator National Council on Aging (NCoA) 600 Maryland Ave., S.W. Washington, DC 20024 (202) 479-1200 x 362		X	X	X	X		X		X	X	
14. Gerilyn Miller-Merens Project Director, Elderly Housing Task Force Metropolitan Chicago Coalition on Aging 53 W. Jackson - Suite 919 Chicago, IL 60604 (312) 922-5890	X	X	X	X	X	X	X		X	X	

BEST COPY AVAILABLE

(I AM WILLING TO:)

FACILITATOR/NETWORKERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
15. Beverly Nash Housing Administrator Metropolitan Chicago Coalition on Aging 53 West Jackson - Suite 919 Chicago, IL 60604 (312) 922-5890	X	X	X		X	X	X		X	X	
16. Sister Susan Sanders, RSM Policy Analyst/Program Developer Sisters of Mercy - Mercy Coordinating Center 1 S. 450 Summit Oak Brook Terrace, IL 60181 (312) 953-2970) (See also: NON-PROFIT SPONSOR)	X	X	X								
17. Robert J. Sell Chairman, Illinois State Legislative Committee AARP 1819 Leland Ave. Chicago, IL 60640 (312) 275-9323	X										

BEST COPY AVAILABLE

FACILITATOR/NETWORKERS (continued):

(I AM WILLING TO:)

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
18. Mrs. Thelma Stumpf Chairman, Advisory Region II Region II 544 West Downer Aurora, IL 60506 (312) 896-8742	X	X	X	X	X		X				
19. Jeanne Van Kirk 505 W. Lake Shore Drive - Apt.1005 Chicago, IL 60611 (312) 661-0782			X				X				
20. Tim Wintermute Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, Michigan 48104 (313) 461-9185 (See also: RESEARCHER/PLANNER)	X	X	X	X	X		X		X	X	

BEST COPY AVAILABLE

(I AM WILLING TO:)

FINANCIERS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Salvatore V. Ferrera Executive Vice President Metropolitan Housing Development Corporation 29 E. Madison St. Chicago, IL 60602 (312) 236-9673 (See also: DEVELOPER - MANAGER BUILDER/REHABBER)	X	X	X			X			X		X
2. Philip A. Hickman Senior Vice President Harris Webber Ltd. 666 Dundee Road Suite 903 Northbrook, IL 60062 (312) 272-9686 (See also: ARCHITECT - DEVELOPER - MANAGER)	X	X	X	X	X	X	X	X	X	X	
3. Claudette R. Miller President/Administrator Unique Living Chateau 2719 E. 75th St. Chicago, IL 60649 (312) 978-5206 (See also: DEVELOPER - SERVICE PROVIDER - MANAGER)	X	X	X							X	

BEST COPY AVAILABLE

(I AM WILLING TO:)

HOUSING MANAGERS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Marjorie Beyer, MPA Director, Planning & Development-Geriatric Housing & Support Services Chatham Center 753 E. 79th St. Chicago, IL 60619 (312) 874-5675 (See also: BUILDER/REHABBERS - SERVICE PROVIDER - DEVELOPER - FACILITATOR/NETWORKER)	X	X	X				X		X	X	
2. Hanora Chase Assistant Manager Chicago Housing Authority - Senior Housing 1845 N. Larrabee Chicago, IL 60614 (312) 642-2985	X	X	X								
3. Sister M. Marcian Deisenroth, RSM Asst. Resident Manager Mercy Residence of Tolentine Center 20300 Governors Highway Olympia Fields, IL 60416 (312) 748-9500 (See also: SERVICE PROVIDER)	X	X									

BEST COPY AVAILABLE

(I AM WILLING TO:)

HOUSING MANAGERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
4. Salvatore V. Ferrera Executive Vice President Metropolitan Housing Development Corporation 29 E. Madison St. Chicago, IL 60602 (312) 236-9673 (See also: DEVELOPER - FINANCIER - BUILDER/REHABBER)	X	X	X			X			X		X
5. Philip A. Hickman Senior Vice President Harris Webber Ltd. 666 Dundee Road, Suite 903 Northbrook, IL 60062 (312) 272-9686 (See also: ARCHITECT - DEVELOPER - FINANCIER)	X	X	X	X	X	X	X	X	X	X	
6. Sue Kessell Social Service Director/Manager Village Center 5140 Galitz St. Skokie, IL 60077 (312) 674-8962	X	X	X		X		X			X	
7. Claudette R. Miller President/Administrator Unique Living Chateau 2719 E. 75th St. Chicago, IL 60649 (312) 978-5206 (See also: DEVELOPER - SERVICE PROVIDER)	X	X	X							X	

BEST COPY AVAILABLE

HOUSING MANAGERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
8. Peter S. Mulvey, Executive Director The Presbyterian Home 3200 Grant St. Evanston, IL 60201 (312) 492-2900 (See also: NON-PROFIT SPONSOR)	X		X								
9. Averil Schreiber, Administrator Barb City Manor 680 Haish Blvd. De Kalb, IL 60115 (815) 756-8444 (See also: SERVICE PROVIDER)	X	X	X				X				
10. Carol M. Stabinski, Vice President - Management/Marketing Harris Webber Ltd. 666 Dundee Rd.-Suite 903 Northbrook, IL 60062 (312) 272-9686 (See also: DEVELOPER)						X	X		X	X	
11. Mary Eleanor Wall, Housing Director Senior Home Sharing Inc./Du Page Senior Citizens Council Eastgate Professional Bldg. #A-6 837 S. Westmore Lombard, IL 60148 (312) 620-0804 (See also: NON-PROFIT SPONSOR)	X	X	X								

BEST COPY AVAILABLE

(I AM WILLING TO:)

NON-PROFIT SPONSORS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. John A. Laker Executive Director Family Service Association of Du Page 402 W. Liberty Drive Wheaton, IL 60187 (312) 682-1802	X	X	X				X			X	
2. Daniel Lee Social Worker Oak Forest Hospital 15900 Cicero Avenue Oak Forest, IL 60452 (312) 978-4200 x 1238	X	X			X						X
3. Peter S. Mulvey Executive Director The Presbyterian Home 3200 Grant St. Evanston, IL 60201 (312) 492-2900 (See also: MANAGER)	X		X								
4. Sister Jeanne Oursler, CSJ President Sisters of St. Joseph 1515 W. Ogden LaGrange Park, IL 60525 (312) 354-9200	X	X									

BEST COPY AVAILABLE

(I AM WILLING TO:)

NON-PROFIT SPONSORS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
5. Sister Susan Sanders, RSM Policy Analyst/Program Developer Sisters of Mercy - Mercy Coordinating Center 1 S. 450 Summit Oakbrook Terrace, IL 60181 (312) 953-2970 (See also: FACILITATOR/NETWORKER)	X	X	X								
6. Danguole Valentinas Executive Director Lithuanian Human Services of the USA, Inc. 2636 W. 71st St. Chicago, IL 60629 (312) 476-2655 (See also: SERVICE PROVIDER)	X	X									
7. Mary Eleanor Wall Housing Director Senior Home Sharing inc./Du Page Senior Citizens Council Eastgate Professional Bldg. #A-6 837 S. Westmore Lombard, IL 60148 (312) 620-0804 (See also: MANAGERS)	X	X	X								

BEST COPY AVAILABLE

(I AM WILLING TO:)

PUBLIC RELATIONS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Stanley D. Banash President Stanley D. Banash and Associates 5940 North Neva Avenue Chicago, IL 60631 (312) 763-5767		X									

BEST COPY AVAILABLE

(I AM WILLING TO:)

REAL ESTATE:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Phyllis U. Badesch Badesch & Associates, Ltd. 821 Case Street Evanston, IL 60202 (312) 328-3309 (See also: DEVELOPER - FACILITATOR/NETWORKER)	X	X	X	X	X	X	X	X	X	X	
2. Susan Kahn Real Estate Sales Heil, Heil, Smart & Golee 1515 Chicago Ave. Evanston, IL 60201 (312) 866-7400				X							
3. John Levinsohn John L. Levinsohn, Real Estate, Inc. 60 E. Sir Francis Drake Blvd.R.308 Larkspur, CA 94939 (415) 461-7100		X	X	X	X	X					
4. Sandra Moore General Manager Relocation Consultants, Inc. 579 W. North Ave. Elmhurst, IL 60126 (312) 279-1423		X									

BEST COPY AVAILABLE

RESEARCHER/PLANNER:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Carol Abram , Chairman Housing Commission City of Highland Park 357 Park Ave. Highland Park, IL 60035 (312) 433-4725		X									
2. Ann Brooks Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, MI 48104 (313) 461-9185 (See also: FACILITATOR/NETWORKER)	X	X	X	X	X		X		X	X	
3. Diane Carstens Director of Planning & Research LeisureCare, Inc. Leisure Square Mall 1000 State Road 70 Lakewood, NJ 08701 (201) 370-0446 (See also: DEVELOPER)	X	X	X		X						
4. Donna Drinan Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, MI 48104 (313) 46109185) (See also: FACILITATOR/NETWORKER)	X	X	X	X	X		X		X	X	
5. Alan R. Factor Market Research Consultant 3329 W. Crain St. Skokie, IL 60076 (312) 679-6115/674-9889 (See also: FACILITATOR/NETWORKER)		X	X	X	X		X		X	X	

BEST COPY AVAILABLE

RESEARCHER/PLANNER (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
6. Steven C. Fox, D.O. 9625 South Crawford Ave. Evergreen Park, IL 60642 (312) 499-0505 - (R) 361-5557	X	X	X	X	X	X	X	X	X	X	
7. Leonard F. Heumann, Professor Dept. of Urban & Regional Planning University of Illinois 1003 W. Nevada Urbana, IL 61801 (217) 333-3020	X	X	X				X			X	
8. Laurie Marston Community Development Coordinator City of Des Plaines 1420 Miner St. Des Plaines, IL 60016 (312) 391-5381	X	X	X								
9. Thomas R. & Deanna L. Nutting Co-owners Independent Consulting Services P.O. Box 1126 Eau Claire, WI 54702-1126 (715) 839-7414	X	X			X		X		X		
10. Tim Wintermute Wintermute and Brooks, Inc. 920 Greene St. Ann Arbor, MI 48104 (313) 761-9185 (See also: FACILITATOR/NETWORKER)	X	X	X	X	X		X		X	X	

BEST COPY AVAILABLE

(I AM WILLING TO:)

SERVICE PROVIDERS:

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
1. Mary Ellen Bernard Director of Therapeutic Recreation & Residential Apts. Bowman Center (Rush-Presbyterian-St. Luke's) 710 S. Paulina Chicago, IL 60612 (312) 942-7041 (Never available Tues.PMs)	X	X							X		
2. Marjorie Beyer Director, Planning & Development - Geriatric Housing & Support Services Chatham Center 753 E. 79th St. Chicago, IL 60619 (312) 874-5675 (See also: DEVELOPER - MANAGER FACILITATOR/NETWORKER - BUILDER/REHABBER)	X	X	X				X		X	X	
3. Eulene Cohan Northwest Service Coordination 306 W. Park St. Arlington Heights, IL 60005 (312) 577-7070	X	X	X	X	X	X			X		

BEST COPY AVAILABLE

(I AM WILLING TO:)

SERVICE PROVIDERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
4. Sister M. Marcian Deisenroth, RSM Assistant Resident Manager Mercy Residence of Tolentine Center 20300 Governors Hwy. Olympia Fields, IL 60416 (312) 748-9500 (See also: MANAGER)	X	X									
5. Marci Factor-Karoll Community Coordinator Metropolitan Chicago Coalition on Aging 53 W. Jackson - Room 918 Chicago, IL 60604 (312) 922-5890	X	X	X	X							
6. Philip W. Gilroy Executive Director St. Elizabeth's Hospital 1431 N. Claremont Ave. Chicago, IL 60622 (312) 278-2000		X	X	X			X				
7. Marilyn Greenfield Paralegal Attorney General's Office 174 W. Randolph Chicago, IL 60601 (312) 793-2298		X									

BEST COPY AVAILABLE

(I AM WILLING TO:)

SERVICE PROVIDERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
8. Donna Stark Hayden Community Relations Manager Region Two AAoA Bldg. 6, Suite 39 245 W. Roosevelt Rd. West Chicago, IL 60185 (312) 293-5990		X	X			X					
9. Hope Hornstein Assistant Director, Consultation and Education Ravenswood Mental Health Center 4545 N. Damen Chicago, IL 60625 (312) 878-4300 x 1455		X	X				X				
10. Linda C. Hussey Case Manager Southwest Suburban Center on Aging 111 W. Harris Ave. La Grange, IL 60525 (312) 354-1323	X	X	X				X				
11. Bill Levy, President Harper Realty, Inc. 900 West Jackson Chicago, IL 60607 (312) 666-2666 (See also: DEVELOPER - BUILDER/REHABBER)	X	X	X	X							

BEST COPY AVAILABLE

(I AM WILLING TO:)

SERVICE PROVIDERS (continued):

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
12. Pat McHale Community Health Village of Schaumburg 101 Schaumburg Ct. Schaumburg, IL 60193 (312) 894-4500		X	X	X			X			X	
13. Claudette R. Miller President/Administrator Unique Living Chateau 2719 E. 75th St. Chicago, IL 60649 (312) 978-5206 (See also: DEVELOPER - MANAGER)	X	X	X							X	
14. Mary Kay Morrissey Director Village of Niles Senior Citizen Department 8060 Oakton Street Niles, IL 60648 (312) 967-6100 x 376	X	X	X				X				
15. Lilo Salmon, Coordinator H.O.M.E. 2935 W. Irving Park Road Chicago, IL 60618 (312) 478-6444	X										

BEST COPY AVAILABLE

SERVICE PROVIDERS (continued):

	(I AM WILLING TO:)											
	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws
16. Alice Schlosberg Director H. M. Fisher Senior Center 5821 N. Broadway Chicago, IL 60660 (312) 728-1215	X	X	X								
17. Averil Schreiber Administrator Barb City Manor 680 Haish Blvd. De Kalb, IL 60115 (815) 756-8444 (See also: MANAGER)	X	X	X				X				
18. Wayne A. Swiniarski Assistant Hospital Administrator Walther Memorial Hospital 1116 North Kedzie Ave. Chicago, IL 60651 (312) 227-3100 x 3003	X	X	X		X		X				
19. Danguole Valentinas Executive Director Lithuanian Human Services of the USA, Inc. 2636 W. 71st St. Chicago, IL 60629 (312) 476-2655 (see also: NON-PROFIT SPONSOR)	X	X									

BEST COPY AVAILABLE

SERVICE PROVIDERS (continued):

20. Edith Westmoreland
Coordinator
ECHO Mental Health Center
938 West 69th St.
Chicago, IL 60621
(312) 962-5554

	Attend congregate housing meetings	Network with others	Be a resource person	Identify sites	Review proposals	Identify funding sources	Review support services	Develop blueprints	Identify/research resident markets	Develop management policies/training	Consult on tax/real estate laws

BEST COPY AVAILABLE

Alphabetized Index

Name	Architects	Attorneys	Builders/Rehabbers	Developers	Facilitator/Networkers	Financiers	Housing Managers	Non-Profit Sponsors	Public Relations	Real Estate	Researcher/Planner	Service Providers
	PAGE NUMBER LISTING CAN BE FOUND ON											
Abrams, Carol											23	
Awsumb, Carl	1											
Bedesch, Phyllis				6	9					22		
Banash, Stanley									21			
Bernard, Mary Ellen												25
Bernheim, Fred	1		4	6								
Beyer, Marjorie			4	6	9		16					25
Brooks, Ann					9						23	
Carstons, Ann				6							23	
Caruso, F. Willis		3										
Chase, Hanora							16					
Cinnelli, Daniel	1											
Cohan, Eulene												25
Cohen, Mrs. Ted					9							
Drinan, Donna					10						23	
Deisenroth, Sister M. Marcian							16				23	
Factor, Alan					10						23	
Factor-Karoll, Marci												26
Falcon, Jerry				7								
Ferrera, Salvatore V.		4		7		15	17					
Fox, Steven C.											24	
Gall, Linda					10							

BEST COPY AVAILAB

Alphabetized Index

Name	Architects	Attorneys	Builders/Rehabbers	Developers	Facilitator/Networkers	Financiers	Housing Managers	Non-Profit Sponsors	Public Relations	Real Estate	Researcher/Planner	Service Providers
	PAGE NUMBER LISTING CAN BE FOUND ON											
Gaynes, Neil				7								
Gilroy, Philip W.												26
Greenfield, Marilyn												26
Guthrie, Wayne t.					10							
Haselhuhn, Gerald R.	1		5		11							
Haydon, Donna Stark												27
Huemann, Leonard F.											24	
Hickman, Philip A.	2			7		15	17					
Hornstein, Hope												27
Hubbard, Nancy	2											
Hussey, Linda C.												27
Kahn, Susan										22		
Kessell, Sue							17					
Knight, Leslie					11							
Laker, John A.								19				
Lee, Daniel								19				
Levinson, John										22		
Levy, Bill			5	7								27
Logan, Jan					11							
Murchie, Jack	2											
Mann, Sally					12							
Marston, Laurie											24	
McHale, Pat												28

BEST COPY AVAILABLE

Alphabetized Index

Name	Architects	Attorneys	Builders/Rehabbers	Developers	Facilitator/Networkers	Financiers	Housing Managers	Non-Profit Sponsors	Public Relations	Real Estate	Researcher/Planner	Service Providers
	PAGE NUMBER LISTING CAN BE FOUND ON											
Michaelson, Cathy					12							
Miller, Claudette				8		15	17					28
Miller-Merens, Gerilyn					12							
Moore, Sandra										22		
Morrissey, Mary Kay												28
Mulvey, Peter S.							18	19				
Nash, Beverly					13							
Nutting, Deanna L.											24	
Nutting, Thomas R.											24	
Ousler, Sister Jeanne								19				
Robinson, Lenwood	2											
Salmon, Lilo												28
Sanders, Sister Susan					13			20				
Schlosberg, Alice												29
Schrieber, Averil							18					29
Schulte, Mark				8								
Sell, Robert J.					13							
Stabinski, Carol M.				8			18					
Stumpf, Thelma					14							
Swiniarski, Wayne A.												29
Valentinas, Dangoule								20				29
Van Kirk, Jeanne					14							
Wall, Mary Eleanor							18	20				

BEST COPY AVAILABLE

Alphabetizod Index

Name	Architects	Attorneys	Builders/Rehabbers	Developers	Facilitator/Networkers	Financiers	Housing Managers	Non-Profit Sponsors	Public Relations	Real Estate	Researcher/Planner	Service Providers
	PAGE NUMBER LISTING CAN BE FOUND ON											
Westmoreland, Edith												30
Wintermute, Tim					14						24	

BEST COPY AVAILABLE

RESPITE CARE POLICY RECOMMENDATION PAPER

MCCoA's Respite Care Committee asks federal and state authorities to allocate funding for a new category of service called respite care. Respite care services would include a variety of support services to fulfill the respite needs of caregivers of the frail elderly.

Currently, families are the major and most cost-effective providers of care for their frail aging relatives, preventing their premature institutionalization. However, increased life expectancy and women's entry into the labor force have placed severe strains on a family's ability to care for aging relatives at home on a sustained basis. Social service agencies recognize this, but find it difficult to augment family support with respite for the family caregiver, usually a middle-aged adult child. Only by manipulating the current system and providing respite through Title III-B services (homemaker, personal care, etc.) or through Community Care Program services (adult day care, chore services, etc.) can respite be provided for middle-aged caregivers. Soon agencies in Illinois will be able to provide temporary institutional respite for periods of 24 hours or more under the Illinois Respite Care Demonstration Act. However, institutional respite does not meet all respite care needs.

Therefore, the Respite Care Committee would like to make several policy recommendations for state and federal authorities to consider in meeting needs of frail elderly persons and their caregivers:

1. Respite care primarily prevents institutionalization of the frail elderly person by indirectly supporting his caregiver, enabling this caregiver to maintain the frail older person in the community. Therefore, we recommend that a definition of respite care, that designates the frail older person as the primary beneficiary of respite care services, be adopted:

> Adult Respite Care: The planned, ongoing or periodic provision of a range of support services to a dependent older person in his home or in a protective setting, to sustain the primary caregiver emotionally and physically in the caregiving role. By supporting the primary caregiver, respite care services prevent unnecessary institutionalization of the frail elderly dependant, as well as minimize the incidence of elder abuse and neglect that results from unrelieved caregiver stress. A caregiver is anyone who the frail elderly person depends on to remain living in his home and can include a spouse, sibling, adult child, neighbor, or friend. Respite services should enhance, not replace, caregiver support. Respite services should be provided by trained persons under the supervision of professionals who regularly review changes experienced by caregivers and their frail elderly dependents and who can suggest changes in respite services as clients' needs change. The following support services provided flexibly over time, in a variety of settings, may constitute respite care:
>
> adult day care
> chore housekeeping
> companion care

BEST COPY AVAILABLE

friendly visiting
home delivered meals
home health services
homemaker services
nursing care
personal care
temporary institutionalization

The Committee feels that adoption of this definition is a first step to show that the elderly person is the principal beneficiary of respite services. This recognition will be necessary in order to request increased Title III-B and Community Care Program funds for respite care purposes.

2. There is an already high and ever increasing need for respite care services in Illinois. This need is expected to steadily increase as the population of persons age 85+ continues to rise. However, it is difficult to document the extent of this need to federal and state authorities because there is no uniformity in the documentation of respite care cases among agencies. For example, we recognize that when a client requests companion services, it is unclear whether to categorize the request under companion service or under respite care, since this service may provide respite to a caregiver while also serving the elderly person.

Therefore, we recommend that a standard for categorizing respite care cases be adopted statewide in order to realistically document the need for funding of respite care services.

We suggest the following guide: when chore, companion, homemaker, etc. services are requested by or for an elderly person who lives alone and who receives little or no support from a caregiver, then such a request should be documented as chore, companion, homemaker, etc. However, when these same services are requested by or for an elderly person who is regularly dependant upon a caregiver, then such a request should be documented as respite care since it enhances the support required for the elderly person that was provided by their caregiver.

3. We recommend that a wide range of services, which can be provided flexibly over time in a variety of settings, be provided to meet the various care and lifestyle needs of caregivers and their frail elderly dependents.

- Service-type flexibility to meet elderly person's level of frailty. Some caregivers may only need a home companion to assist their elderly dependent with mobility problems; whereas for other caregivers, a trained personal care worker might be required to bathe or monitor medication for a more frail person with severe memory loss.

- Service-type flexibility to meet caregiver's lifestyle. Some caregivers may have become emotionally drained and prefer relief time away and/or support groups; whereas others may have become physically exhausted and need the assistance of a choreworker in order to continue keeping the home environment suitable for their frail dependent.

BEST COPY AVAILABLE

- Setting Flexibility. Some caregivers may prefer bringing their elderly dependent to an adult day care or other institutional setting; whereas others prefer in-home respite services.

- Time Flexibility. Some caregivers may require respite services two hours every three days a week, or during nights, on a continued basis; whereas others require respite for periods of 1-2 weeks each year to enable them to go on a vacation knowing that their frail relative is being properly cared for. Therefore, the following services, provided flexibly over time, should be available as respite care:

  adult day care
  chore housekeeping
  companion care
  friendly visiting
  home delivered meals
  home health services
  homemaker services
  nursing care
  personal care
  temporary institutionalization

4. We recommend that federal and state legislation which gives tax credits, deductions, or other allowances to families caring for frail elderly relatives be introduced and supported.

_____ supports the
(Name of Organization)

recommendations set out in this paper.

_____
(Name)

_____
(Date)

Prepared by Gaillyn Miller
Project Director
Elderly Housing Task Force
Metropolitan Chicago Coalition on Aging

BEST COPY AVAILABLE

Task Force to Create Affordable Housing Alternatives for the Elderly
Final Report
Appendix

MCCoA Focus

The Metropolitan Chicago Coalition on Aging Newsletter

Special Respite Care Issue

Vol. 6, No. 1 Summer, 1986

Respite Care Surveys Examine Effectiveness

Four recent surveys (by the MCCoA Respite Care Committee, the Chicago Department on Aging and Disability, the University of Illinois College of Nursing, Department of Public Health Nursing, the Visiting Nurse Association of Evanston, the Evanston Hospital Corporation, the Illinois Hospital Association, and the Illinois Council of Home Health Services) measured the need for respite care services. Each survey looked at the issue from a different perspective. This article summarizes the results.

Respite care deters the institutionalization of an elderly person by offering relief to the primary caregiver. These ongoing periodic support services are intended to sustain the primary caregiver both emotionally and physically, thus enabling the caregiver to better maintain the older person.

Four recent surveys examined various aspects of respite care and its effectiveness. The summaries of survey results follow.

Determination of Need for Respite

The City of Chicago's Department on Aging and Disability conducted a survey of caregivers of case management clients. The purpose was to determine who is likely to need respite care, and if the Illinois Department on Aging's Determination of Need (DoN) scale can predict need. This scale lists 16 activities of daily living; the study ranks the care receiver by his need for assistance with the activity and by how adequately that need is being met.

The study's population included male clients whose scores indicated that they were receiving assistance with activities they could not accomplish themselves. The presence of a caregiver signalled the potential need for respite care.

Results: Of 70 caregivers surveyed by phone, 40 (57.1%) reported not having enough time for themselves (the definition of respite need for this study). There was a definite correlation between the number of activities caregivers assist with and their stated need for respite. Caregivers assisting with five or more activities were more likely to report a need for respite than those assisting with four daily activities or less.

Another significant finding was that the need for respite was reported much more frequently by caregivers helping with personal care, such as feeding and bathing, than by those helping with household chores. Over

Cont'd p. 8

Inside

MCCoA Projects . . . . . p. 3
Guardianship Report . . . . . p. 4
Network For Research in Aging . p. 7
Sadelle Greenblatt:
Hall-of-Famer. . . . . p. 9

53 West Jackson Boulevard • Chicago, Illinois 60604 • (312) 922-5890

BEST COPY AVAILABLE

Focus on Respite

This issue of MCCoA *Focus* highlights respite care: "the planned, ongoing and periodic provision of a range of support services to a dependent older person in his home or in a protective setting to sustain the primary caregiver emotionally and physically in the caregiving role." We report the results of four recent surveys analyzing different aspects of respite care and we print a speech on respite care given last October to a group of Illinois legislators by Pat Koko, Executive Director of the Home Campanion Service and member of MCCoA's Respite Care Committee.

The major purposes of the Respite Care Committee are to educate the public about respite care and to stimulate the development of respite care programs. Meeting since the fall of 1984, as part of MCCoA's Elderly Housing Task Force Project, the committee has enjoyed the active support and participation of such people as Pat Koko, Jeanette Porter of the Illinois Department on Aging, Rosemary Gemperle of the Chicago Department on Aging and Disability, Jean Meyer of Lutheran Home and Services for the Aged (Arlington Heights), Nancy Ryskie of United Charities of Chicago, and Paul McVicker of Nursefinders of Chicago. In all, the committee comprises thirty health and social service agencies from the metropolitan area, the collar counties, and Springfield.

Early in 1985 the committee devised the definition of respite care given above. The full definition is considerably longer and emphasizes service to the older person as opposed to the caregiver (to preserve eligibility for older Americans Act and Community Care Program funding), a case management approach to respite care provision, and the maintenance of existing informal caregiving networks. The committee then proceeded to establish a data base for its work. In cooperation with the Illinois Department on Aging and selected case coordination units, a respite subcommittee collected information on respite statewide which showed that almost 40% of the needs of family caregivers is unmet by current social services. A related fact-finding effort, conducted by another subcommittee in cooperation with the Illinois Hospital Association, revealed that respite services are more cost effective than nursing home care.

In October, 1985, the committee launched a major advocacy effort as its media subgroup met with state legislators in a session hosted by Representative Phil Rock. Committee members testified on respite care needs and benefits and presented the committee's policy recommendations endorsed by more than 100 agencies throughout Illinois. This sign of public recognition of the committee's expertise was followed by another: the Illinois Department on Aging asked MCCoA to develop the Request for Proposal and supporting materials for its new Residential Respite Demonstration Project. This demonstration will provide respite care for older people in intermediate care facilities across the state.

The committee's latest initiative is the Collaborative Respite Volunteer Project. This project will pool the resources of MCCoA, committee member agencies, and church groups to match families who need respite care with volunteers who can provide it. Project tasks will include identifying families who need respite, recruiting and training community volunteers, and developing a fundraising strategy to acquire public and private support for the program. This program has the potential to generate much community support for and participation in respite care services, and we congratulate the committee for its inventiveness and energy in originating it.□

MCCoA Focus is published by the **Metropoliton Chicago Coalition on Aging** for distribution to its members. The opinions presented do not necessarily represent those of all MCCoA members. Written permission is required to reprint the contents of this newsletter. Address all correspondence to *MCCoA Focus*, 53 W. Jackson Blvd., Chicago, IL 60604.

President, **Peter Guck**, Commonwealth Edison Company Executive Director, **Dennis R. Bazzi**, Associate Executive Director, **Roger Nash** Editor, Kathy Rose

BEST COPY AVAILABLE

THE BENEFITS OF RESPITE CARE

BY Patricia Connery Koko

Pat Koko is Executive Director of the Home Companion Service. The following speech was given at a legislative meeting of Illinois senators and representatives on October 30, 1985.

We are grateful to Senator Philip Rock for helping us organize this meeting, and we appreciate our audience for spending time with us this busy morning. Our goal is to explain respite care and how this issue affects older citizens and their caregivers. The Respite Care Committee of MCCoA met to study the issue and develop policy recommendations. The diverse organizations which comprise this committee have agreed on a definition for respite care:

> The planned, ongoing or periodic provision of a range of support services to a dependent older person in his home or in a protective setting to sustain the primary caregiver emotionally and physically in the caregiving role.

Probably everyone in this room has a living parent or an older relative. In fact, it is no longer uncommon to find households with two generations over age 65 - sometimes even three. But while many people are enjoying longer, healthier lives, there often comes a time when they are frail and need care. Our committee realized that today's family members face different care needs at different times in their lives.

Perhaps the most important aspect of respite care is the range of support services. The community needs to make a variety of options available to older citizens and their caregivers, such as temporary sitter services, personal care aides, housecleaners, and for those who choose it, institutional or congregate care. If these services could be made cost effective over a long period of time, caregivers could look forward to a break in their often very demanding work.

The small agency I manage provides a variety of in-home respite care services, and I know these services can help in the areas of premature institutionalization and elder abuse and neglect. Caring for and being on call for an older person is stressful over time. Those caregivers who receive some help are very often relieved of the tension which could impair their services.

One example of the benefits of caregiver relief is an 87-year-old man who is served by our agency. His 95-year-old sister is confused, restless, and deteriorating physically. She needs 24-hour monitoring, but after living together most of their lives, her brother is not willing to institutionalize her. They certainly aren't wealthy, but he manages to pay one of my independent contractors to come to their home for ten hours each night. In this way, the brother can get the rest he needs and his sister can continue to live at home.

Though I'm biased in favor of a local adult day care center, we share several clients who enjoy and benefit from both the socialization and services of the center several days a week. On the other days, they have personal care assistance at home, usually because the regular caregiver works outside the home.

Often, respite care is needed because the caregiver must work full or part time to make ends meet. But such relief is also often needed by an entire caregiving family, so that they can take a vacation together. Institutional or congregate care may be their answer. Sometimes, the caregiver is an older person or even a child, both of whom may not be physically strong enough to fully care for someone else.

Because caregiver relief must meet a variety of needs at various times in a person's life, our committee advocates a full range of support services. We're studying data to find the missing links and help to make these services affordable and accessible to people of all ages. □

BEST COPY AVAILABLE

MCCoA

Metropolitan Chicago Coalition on Aging

HOUSING ALTERNATIVES

The Eighth Annual
Metropolitan Chicago Coalition on Aging
Forum on Aging Series
1985

I. (PART A) HOME-SHARING AND ACCESSORY APARTMENTS: BENEFITS AND BARRIERS
FEBRUARY 22, 8:30 a.m. - 12:00 noon

Older homeowners and renters alike can benefit from alternative living arrangements such as home-sharing (where a homeowner shares living space in his home with a renter) or accessory apartments (where a homeowner installs a separate apartment within his home). How do home-matching programs match potential renters with homeowners, and what does it take to start such programs? What does it cost to install accessory apartments, and are remodelers sensitive to the barrier-free needs of frail tenants? What local zoning barriers impede the expansion of these options?

Patrick H. Hare, Urban Planner, Maryland National Capital Park and Planning Commission

Maurice Parrish, Zoning Administrator, City of Chicago Department of Zoning

William Rotolo, Director of Community Development, Village of Wilmette

(PART B) ECHO HOUSING: BENEFITS AND BARRIERS
FEBRUARY 22, 1:00 p.m. - 3:00 p.m.

ECHO Housing units are separate, pre-fabricated, barrier-free housing units. An older person can receive support from his family, yet maintain his independence, when an ECHO unit is installed on the property of his adult child's single family house. What do ECHO units look like and what do they cost? How can zoning barriers be overcome to permit their use in the Chicago area? How can hospitals and home health agencies be encouraged to develop clusters of ECHO units as sites for providing care to convalescing patients?

Patrick H. Hare, Urban Planner, Maryland National Capital Park and Planning Commission

II. RESPITE CARE: HELPING FAMILIES KEEP ELDERLY RELATIVES AT HOME
MARCH 22, 8:30 a.m. - 12:00 noon

Families are the major and most effective providers of care for their frail aging relatives. However, increased life expectancy and women's entry into the labor force have placed strains on a family's ability to care for aging family members at home. How do we define respite care? Would respite services, such as adult day care, temporary institutionalization, in-home services, and companion services, relieve family caregivers sufficiently to enable them to continue caring for frail relatives at home? Could healthy older persons be effective respite care service providers? Does respite care serve the family caregivers, the frail relative or both?

Panel Discussion:

Mary Lou Budnick, Director of Grants Management, Chicago Department on Aging and Disability

Manja Davis, Associate Executive Director, Family Care Services of Metropolitan Chicago

Patrick H. Hare, Urban Planner, Maryland National Capital Park and Planning Commission

Joan Rogers, Manager, Long Term Care Division, Illinois Department on Aging

Moderator: Jonathan Levin, Executive Director, Suburban Cook County Area Agency on Aging

59 West Jackson Boulevard • Suite 319 • Chicago, Illinois 60604 • (312) 922-5890

BEST COPY AVAILABLE

III. HOME EQUITY CONVERSIONS: PROS AND CONS
APRIL 26, 8:30 a.m. - 12:00 noon

Home equity conversions allow elderly homeowners to convert their homes' accrued equity into usable cash without forcing them to leave their homes. What are the distinctions between the sale-leaseback, the reverse annuity mortgage, and other variations of home equity conversion plans? Where are home equity conversion programs currently operating, and can these be replicated for use in the Chicago area? Can home equity conversion finance health care? What legal and financial rights for the elderly homeowner are associated with each plan?

Leo E. Baldwin, Senior Coordinator of Housing Programs, American Association of Retired Persons - National Headquarters
Robert Katz, Director, Housing Research and Development Program, University of Illinois - Urbana
William Perkins, Special Assistant for Housing Policy and Program Development, Wisconsin Department of Development, Division of Housing

Moderator: Leo E. Baldwin

IV. CONGREGATE/LIFE CARE: SUPPORTIVE GROUP LIVING
MAY 24, 8:30 a.m. - 12:00 noon

Congregate housing can help older persons to continue living independently by providing them a variety of support services. Senior citizen multi-units, small group homes, and life care are among the range of congregate housing choices. Which organizations operate congregate housing in the Chicago area and what services do they provide? How can their programs be replicated in today's housing market? Can service providers and housing developers work together to expand the number of affordable congregate housing units for the elderly?

Lilo Salmon, Program Coordinator, H.O.M.E.
Kenneth Tims, Executive Director, Friendship Village of Schaumburg
Ron Weismehl, Executive Vice President, Council for Jewish Elderly
Zirl Smith, Executive Director, Chicago Housing Authority

Moderator: Mary Gibb, Director, Evanston Commission on Aging

V. FINANCING: THREE FUNDING MECHANISMS
JUNE 21, 8:30 a.m. - 12:00 noon

Cutbacks in federal subsidized housing programs have created a severe shortage of affordable housing for the elderly, making it necessary to look to alternative ways of financing senior housing development. A variety of financing mechanisms have evolved. How does the Illinois Housing Development Authority make revenues available to senior housing developers? What experience have local not-for-profit and proprietary organizations had in financing various types of senior housing? Are these models replicable? How can links be made between organizations interested in producing senior housing and those having the means to finance them?

Bill Lavy, Co-Developer of Lincoln Park Retirement Apartments
George Stone, 1st Deputy Commissioner, Chicago Dept. of Housing.
Mary Nelson, Executive Director, Bethel New Life
Julius Yacker, Partner in the Law Firm of Kack, Mahin and Cate

Moderator: Beverly Nash, Housing Administrator, Metropolitan Chicago Coalition on Aging

VI. POLICY ISSUES IN HOUSING
JULY 19, 8:30 - 12:00 noon

The needs of the elderly in the Chicago area should be considered in the shaping of local zoning, planning and redevelopment policies as well as in federal housing and social service policy. In fact, meeting the needs of the elderly for housing may require the collaborative efforts of city, state, and federal agencies. Do the elderly have a place in our communities? Are they being considered in urban planning? What role can the Illinois Department on Aging play in the planning and implementation of housing policies, now and in the future? How can community agencies, organizations, and institutions serving the elderly contribute to the development of the planning, zoning and housing policies they will eventually implement?

Robert J. Boylan, President, Robert J. Boylan Associates
Elizabeth Hollander, Commissioner, Chicago Department of Planning
Janet Otwell, Director, Illinois Department on Aging

Moderator: Joanne Merritt Assistant Director, Hull House Association

All Forums will be held at: Blue Cross/Blue Shield Building
Second Floo Auditorium
233 North Michigan Avenue

BEST COPY AVAILABLE